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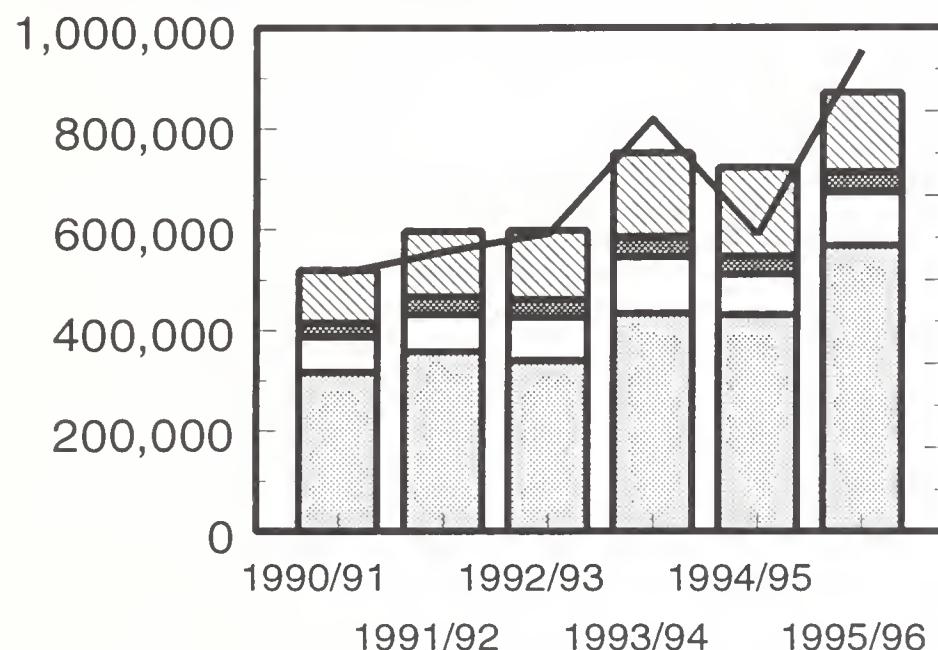




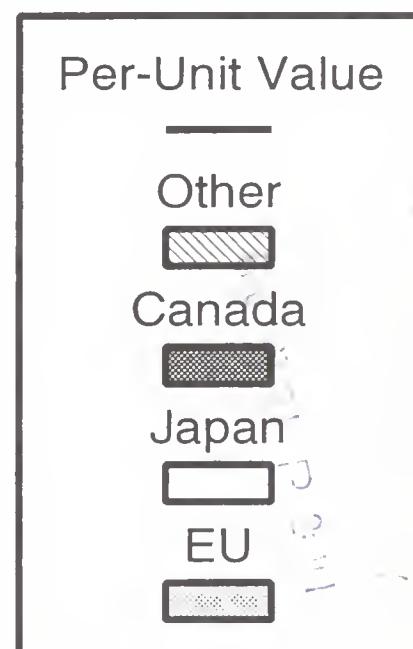
# World Horticultural Trade & U.S. Export Opportunities

## Almond Exports Reached Record Value in 1995/96

Total Value in Dollars



Dollars per Metric Ton



Source: U.S. Bureau of Census

Marketing Year is July-June

The value of U.S. shelled and prepared or preserved almond exports in marketing year 1995/96 reached a record \$870.6 million, 21 percent above the previous year. Higher almond prices, due to significantly smaller world supplies, resulted in higher per-unit export values. The United States, Spain and Greece, the world's three largest almond producers, suffered sharp declines in their 1995/96 crops. Overseas manufacturers of bakery goods, breakfast cereal, candy, and ice cream purchased U.S. shelled almonds even at higher prices because they could not easily substitute other tree nuts in their recipes. Virtually all from California, almonds are the largest single horticultural product exported; two thirds of California's production goes into export. Market Access Program funds have helped the California almond industry expand almond sales over the last 10 years. The European Union is the largest U.S. market, accounting for 65 percent of the total value of U.S. almond exports. Japan and Canada are the second and third largest markets, accounting for 12 percent and 5 percent, respectively.

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**ANALYSIS**

Sam Rosa	202-720-6086	Fresh deciduous fruit, table grapes, apple juice, olives, stone fruit, and CBI
Brian Grunenfelder	202-690-2702	Trade policy, food safety, and plant health group leader
Bill Janis	202-720-0897	Fresh and processed potatoes, tree nuts, tropical fruits, wine and brandy
Bob Knapp	202-720-4620	Canned deciduous fruit, kiwifruit, NAFTA, PL-480 and GSM-102 export credits
Emanuel McNeil	202-720-2083	Fresh and processed vegetables, melons, bananas, nursery products, and cut flowers
Debra A. Pumphrey	202-720-8899	Coffee, cocoa, tea, spices, essential oils, and ginseng
Stephanie Riddick	202-720-9792	Dried fruit, avocados, beer, hops, berries, and circular coordinator
Joe Somers	202-720-2974	Situation and outlook group leader, fresh and processed citrus, trade forecasts, FAO citrus liaison, and circular editor
Debbie Seidband	202-720-6877	Sugar and honey

**MARKETING**

Sarah Hanson	202-720-0911	Deciduous fruit
Ted Goldammer	202-720-8498	Citrus, hops, and potatoes
Wayne Molstad	202-720-0898	Vegetables, grape juice, cranberry juice, honey, kiwifruit, wine and brandy
Stacey Peckins	202-720-5330	Tree nuts, papaya, foliage, plants
Steve Shnitzler	202-720-8495	Dried fruit, avocados, and ginseng

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### Export Summary

U.S. exports of horticultural products to all countries in July reached nearly \$772 million, up 6 percent or \$45.6 million from the same month a year earlier. Twelve out of 15 categories of horticultural exports registered increases. Categories with the most significant increases in July were non-citrus fresh fruit (up \$14 million or 10 percent); canned vegetables (up \$7 million or 16 percent); fresh vegetables (up \$5 million or 6 percent); and miscellaneous items (up \$19 million or 14 percent). The categories with the most significant decreases were fresh citrus (down \$12 million or 26 percent) and frozen vegetables (down \$6 million or 16 percent). During the first 10 months (October-July) of fiscal year (FY) 1996, the total value of U.S. horticultural exports was \$7.85 billion -- 2 percent above the same period last year.

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All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds,  
1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon,  
1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

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U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES  
WORLD TOTAL, OCTOBER - SEPTEMBER YEAR  
JUL 1996

NAME		QUANTITY						VALUES (1000 DOLLARS)					
GROUP	COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TOTATE LAST YR	YR TOTATE CURR YR	LAST YEAR	CURR MON LAST YR	CURR MON CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR		
FRESH CITRUS	MT												
GRAPEFRUIT		21,335	15,161	466,243	485,804	481,743	12,588	8,751	230,517	251,994	239,515		
LEMONS		9,588	11,099	111,790	116,525	126,121	12,624	11,975	99,741	99,171	120,393		
ORANGES, INCL. TM		34,258	22,587	536,209	480,706	580,755	19,461	12,288	297,015	266,785	324,139		
OTHER CITRUS		500	409	23,531	29,386	24,298	3,333	2,261	20,117	24,292	20,790		
Subtotal:----		65,681	49,256	1,137,772	1,112,421	1,212,917	45,006	33,275	647,391	642,242	704,837		
FR. FRUIT, NON-CIT	MT												
APPLES		43,977	33,552	604,308	493,390	663,049	26,406	22,570	363,329	321,526	405,155		
AVOCADOS		466	520	9,255	12,480	12,490	8,867	10,183	10,443	10,297	13,429		
CHERRIES SWT & TRT		7,170	10,529	28,570	36,839	30,268	27,012	35,283	16,509	16,964	13,776		
GRAPES		12,490	15,953	124,133	145,033	204,786	17,794	21,895	159,753	188,608	250,578		
KIWI/FRUITS		161	822	5,822	5,190	9,505	1,188	1,888	12,809	7,214	13,084		
MELONS		43,692	55,805	155,523	164,901	212,882	15,107	16,014	62,933	60,453	85,470		
PAPAYA		695	737	7,101	7,190	8,261	1,744	1,713	15,254	16,350	18,107		
PEACHES & NECTRNS		18,214	20,858	42,671	48,640	68,236	16,559	21,179	42,704	49,034	63,672		
PEARS		3,628	4,973	107,541	124,238	127,961	2,926	3,768	59,312	71,197	71,528		
PLUMS/PRUNES		12,764	21,50	23,724	32,204	40,432	14,503	16,648	27,846	29,506	48,373		
STRAWBERRIES		6,620	4,865	38,993	24,740	49,320	10,287	8,356	67,125	86,630	86,630		
OTHER NON-CITRUS		9,236	5,492	38,249	40,262	48,272	9,837	9,018	47,064	51,852	60,323		
Subtotal:----		157,114	174,566	1,189,450	1,147,104	1,475,462	143,231	157,726	1,006,081	1,005,677	1,256,023		
CAN/PREP FRUIT	MT												
CHERRIES, STONE		180	300	4,558	5,864	5,133	255	342	5,561	6,811	6,336		
FRUIT MIXTURES		1,812	1,187	24,813	20,992	28,885	2,071	1,381	29,111	24,494	34,317		
MARACHINO CHERRY		371	586	3,869	7,159	4,917	722	1,265	8,072	12,773	10,196		
PEACHES, CANNED		1,802	621	15,913	15,326	20,915	1,606	1,701	13,299	14,766	19,088		
PINEAPPLE, CANNED		230	144	3,488	2,847	3,834	206	143	3,136	2,626	3,446		
OTHER CANNED FRUIT		3,517	3,714	38,654	38,302	49,040	4,449	4,480	44,377	43,234	56,630		
OTHER PREP/PRESER		5,476	7,098	60,471	66,380	72,940	5,969	6,882	65,975	66,908	76,558		
Subtotal:----		13,388	13,650	152,766	156,871	185,664	15,225	15,199	168,531	171,612	206,571		
ORIED FRUIT	MT												
PRUNES, ORIED		4,208	4,760	49,913	51,344	60,238	10,339	10,850	117,616	115,547	142,075		
RAISINS, DRIED		9,563	10,493	9,085	12,587	12,832	14,825	17,072	155,815	158,098	196,098		
OTHER DRIED FRUIT		1,989	1,255	2,024	18,380	32,032	4,010	3,214	47,900	44,670	62,303		
Subtotal:----		15,761	16,508	169,022	163,301	214,402	29,174	31,234	320,731	318,450	400,476		
FROZEN FRUIT	MT												
BLUEBERRIES, FROZ		288	351	6,587	8,406	7,742	410	615	9,841	13,506	11,597		
STRAWBERRIES, FROZ		2,557	2,881	20,868	18,407	25,730	3,244	3,527	27,338	24,001	33,530		
OTHER FROZEN FRUIT		2,682	3,487	15,421	23,906	19,310	3,537	4,015	22,288	30,459	27,830		
Subtotal:----		5,527	6,719	42,877	50,719	52,782	7,191	8,157	55,468	67,967	72,987		
FRUIT/VEG JUICES	KL												
GRAPEFRUIT JUICE	CN	6,498	5,811	47,323	52,946	55,966	3,932	4,816	35,906	37,113	41,669		
ORANGE JUICE, CON		52,453	68,304	239,061	270,050	284,382	21,010	17,826	139,069	137,957	162,543		
ORANGE JUICE, NOT		9,171	14,380	131,861	130,418	156,961	6,489	10,248	88,056	94,244	105,564		
OTHER JUICES		34,453	36,780	342,836	408,078	428,750	25,444	27,239	259,756	293,435	319,189		
Subtotal:----		102,575	125,275	761,087	861,495	926,059	56,876	59,960	522,786	562,349	631,735		
FRESH VEGETABLES	MT												
ASPARAGUS, FR, CH		517	641	17,248	13,696	18,544	1,631	2,537	63,218	48,975	66,818		
BROCCOLI		8,182	9,786	103,150	114,958	116,621	6,131	6,955	80,111	74,035	91,261		
CAULIFLOWER		8,358	9,484	84,184	82,217	99,327	5,373	6,221	63,575	61,688	67,676		
CELERY		8,815	9,067	103,691	105,890	111,150	3,041	3,823	63,547	34,752	54,181		
LETTUCE, FR CHLD		12,076	14,509	247,016	249,741	275,794	5,723	6,893	168,051	116,940	184,044		
ONIONS		15,018	14,239	267,156	178,196	311,267	6,728	5,228	92,998	54,998	105,026		
PEPPERS		2,528	4,116	47,143	124,403	130,147	4,290	4,908	46,312	43,428	48,428		
TOMATOES		15,921	16,424	119,589	111,260	139,476	10,819	9,882	29,632	33,568	109,668		
OTHER VEGETABLES		7,657	9,547	658,428	639,786	726,644	33,796	36,521	358,654	338,809	400,144		
Subtotal:----		154,701	177,413	1,646,715	1,560,147	1,848,971	77,314	81,993	1,026,098	862,100	1,136,564		
VEG CANNED	MT												
KETCHUP		3,213	2,583	35,131	34,099	40,412	2,528	2,141	25,580	25,667	29,801		
SWEET CORN, CANNE		13,651	16,583	143,759	144,946	165,153	11,012	13,601	120,144	116,451	138,095		
TOMATO PASTE		4,291	8,997	73,722	78,449	86,613	6,331	6,824	55,807	61,824	71,449		
TOMATO SAUCE		5,957	7,561	67,844	70,662	79,205	5,501	6,790	65,988	66,809	71,615		
OTHER CAN VEG		20,908	22,611	192,721	209,203	234,433	24,520	25,746	231,193	261,983	281,163		
Subtotal:----		48,027	58,335	515,176	537,359	605,818	47,199	54,615	502,712	532,734	598,124		
FROZEN VEGETABLES	MT												
FROZEN FRENCH FRY		36,561	28,412	300,901	289,558	353,131	26,380	20,767	221,419	211,881	260,204		
FZN SWT CORN		4,316	4,346	56,644	50,305	65,341	3,934	3,880	50,055	43,021	57,478		
OTHER POT FZN		1,863	1,419	19,834	16,152	25,303	1,633	1,356	18,871	14,188	20,454		
OTHER FZN VEG		4,335	5,081	59,825	69,984	69,838	4,318	4,324	53,847	53,554	63,109		
Subtotal:----		47,074	39,258	437,204	415,999	513,614	36,265	30,326	342,192	322,643	401,245		
VEG DEHYD	MT												
GARLIC DEHYD		597	738	6,455	7,723	7,832	1,343	1,627	15,058	17,587	18,414		
ONIONS DEHYD		2,240	2,644	28,846	25,087	33,893	5,235	6,456	58,881	58,319	60,932		
POTATOES DEHYD		6,137	4,068	50,499	41,564	58,543	6,133	5,152	46,809	46,345	58,976		
OTHER DEHYD VEG		2,880	5,933	35,086	46,241	42,790	4,054	5,234	56,899	66,932	67,419		
Subtotal:----		11,795	13,423	120,886	120,614	143,037	16,745	20,482	181,646	191,182	215,741		
TREE NUTS	MT												
ALMONDS SH/PREP		13,642	18,977	167,386	240,452	214,014	57,452	62,380	571,453	681,240	724,459		
ALMONDS UNSHLD		907	14,921	14,030	12,939	17,886	2,245	2,189	35,842	31,818	45,293		
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U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES  
WORLD TOTAL, OCTOBER - SEPTEMBER YEAR  
JUL 1996

NAME GROUP & COMMODITY	QUANTITY						VALUES (1000 DOLLARS)					
	CURR MO LAST YR	CURR MO CURR YR	YR TO DATE LAST YR	YR TO DATE CURR YR	LAST YEAR	CURR MON LAST YR	CURR MON CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR		
FRESH FRUIT MT												
APPLES	11,804	16,987	122,978	154,574	142,316	11,807	12,015	83,640	90,839	95,959		
AVOCADOS	354	422	18,059	18,196	18,869	176	370	18,141	15,849	17,637		
BANANAS	306,714	326,053	3,089,051	3,146,251	3,673,713	90,418	96,821	878,429	910,071	1,052,676		
CANTALOUPE	661	1,143	274,764	333,457	224,961	114	267	8,271	105,883	81,334		
GRAPES	11,585	3,383	366,202	340,364	383,688	11,264	5,554	304,577	344,592	309,124		
KIWI FRUIT	2,895	1,888	1,860	1,860	1,860	1,264	1,330	1,792	19,526	1,201,710		
MANGOS	27	18	30	30	30	14	0	31	621	30,851		
PEACHES	18	18	49,299	49,847	49,503	14	28	26,240	33,913	36,365		
PEARS	18	18	47,941	57,289	48,065	6	28	36,996	39,150	42,735		
PINEAPPLES	11,240	12,238	108,261	109,158	124,866	3,804	5,077	36,996	39,150	42,735		
STRAWBERRY	347	315	26,770	30,009	26,776	367	367	45,934	54,475	45,953		
OTHER MELONS	2,567	903	261,843	327,406	262,325	707	155	85,983	92,716	86,115		
OTHER FRUIT	44,211	48,884	420,085	442,970	508,412	25,410	29,379	186,078	214,390	224,758		
Subtotal:----	421,105	442,617	4,936,397	5,186,910	5,672,093	170,875	164,562	1,902,250	2,046,964	2,152,997		
DRIED FRUIT MT												
DRIED APRICOTS	595	320	12,112	12,243	14,220	945	683	19,501	25,783	23,594		
DRIED FIGS & PTS	210	84	1,657	1,695	1,257	67	67	6,536	14,626	14,441		
OTHER DRIED FRUIT	1,821	1,207	1,668	20,656	1,672	3,030	2,999	52,133	31,876	31,876		
Subtotal:----	2,626	1,612	41,437	37,094	48,449	4,206	5,749	58,213	69,561	69,561		
FROZEN FRUIT MT												
FZN BLUEBERRIES	353	488	5,572	5,756	8,365	499	588	7,561	7,584	11,188		
FZN STRAWBERRIES	541	679	25,824	20,641	26,585	516	598	23,833	17,186	26,549		
OTHER FZN FRUIT	3,650	4,858	20,605	27,124	24,786	4,168	4,885	22,713	31,464	27,294		
Subtotal:----	4,545	6,026	52,001	53,520	59,736	6,183	6,072	56,108	56,234	65,031		
CANNED/PREP FRUIT MT												
CANNED OLIVES	6,670	6,661	55,650	61,171	73,806	15,676	17,643	140,505	152,884	168,702		
CANNED ORANGES	3,298	5,153	41,313	50,024	50,983	5,752	4,848	56,014	47,961			
CANNED PEACHES	1,725	1,855	1,700	1,923	1,740	1,303	1,809	7,788	10,779			
CANNED PINEAPPLE	15,636	31,558	250,899	251,983	289,079	8,735	21,841	127,994	158,678	151,203		
MIXED FRUIT	4,429	2,783	2,783	2,889	20,505	2,074	2,750	42,874	32,141	30,493		
PREP/PRES FRUIT	4,429	4,863	2,863	2,863	6,480	2,662	2,958	42,800	32,048	30,398		
OTHER CANNED FRU	6,169	7,069	5,441	49,953	64,817	5,542	6,609	8,076	9,111	78,616		
Subtotal:----	40,133	60,501	510,076	528,345	609,878	44,410	63,875	485,706	552,664	578,151		
FRT&VEG JUICE SSE KL												
APPLE JUICE	75,660	95,110	809,803	737,938	929,630	26,165	35,929	212,930	283,508	256,927		
FCOJ	35,664	65,237	816,372	736,302	885,508	8,824	18,087	164,784	184,071	182,626		
GRAPE JUICE	6,279	30,488	48,639	172,643	62,748	1,946	9,182	16,317	48,450	20,428		
PINEAPPLE JUICE	18,545	32,712	252,409	275,526	289,528	4,709	10,287	5,348	7,707	63,778		
OTHER JUICES	17,106	27,920	207,123	163,685	247,680	8,586	13,115	93,195	114,743	111,096		
Subtotal:----	153,254	251,469	2,134,346	2,112,863	2,425,093	50,229	86,600	540,573	710,933	634,856		
FRESH VEGETABLES MT												
ASPARAGUS	1,681	1,993	21,834	21,087	22,685	2,518	2,603	28,273	25,147	29,250		
BELL PEPPER	4,429	2,670	762	21,233	34,633	3,461	3,833	48,283	48,458	48,664		
CARROTS	4,645	4,932	119,104	155,896	131,364	11,777	9,712	160,317	138,629	167,182		
CHILLI PEPPER	3,847	6,887	54,309	54,354	79,554	3,425	3,174	55,213	49,614	67,491		
CUCUMBERS	7,792	8,675	230,048	288,754	237,483	3,528	3,792	124,822	112,367	127,519		
ONIONS	6,351	8,845	204,676	250,804	216,043	5,710	6,084	119,674	136,198	129,064		
POTATOES	2,767	6,776	217,052	461,792	246,481	481	1,722	39,632	93,040	44,505		
SQUASH	1,934	1,525	108,451	130,269	111,487	920	636	82,426	66,388	83,567		
TOMATOES	30,740	41,473	495,756	651,123	559,771	22,110	31,750	369,407	636,735	406,067		
OTHER FRESH VEG	25,998	32,477	340,116	374,515	396,143	16,133	12,868	213,339	204,214	240,703		
Subtotal:----	92,677	121,147	1,804,299	2,518,601	2,136,812	66,737	80,437	1,262,921	1,520,204	1,388,017		
CANNED/DEHY VEGE MT												
CND ARTICHOKES	2,892	3,037	15,402	21,242	20,902	5,250	4,839	27,375	36,836	37,732		
CND BAMBOO	1,069	1,822	20,033	21,424	21,341	1,088	1,859	16,733	16,304	16,186		
CND MUSHROOMS	7,927	6,120	61,023	45,566	71,766	16,141	12,151	14,926	9,792	167,639		
CND PIMENTO	521	710	290	764	8,580	726	9,928	10,928	10,792			
CND TOMATOES	3,709	4,195	40,247	42,423	56,989	1,527	1,624	14,668	17,988	23,520		
CND WATERCHNUTS	4,601	3,429	28,313	35,105	33,354	3,209	3,030	20,003	27,241	23,904		
TOMATO PTS & SAU	2,934	1,223	43,826	30,524	50,443	2,477	2,165	37,036	28,133	42,627		
DRIED MUSHROOMS	230	124	1,074	1,372	2,352	1,908	1,216	19,671	15,026	22,432		
DRIED TOMATOES	455	509	4,946	4,994	5,587	1,698	1,957	19,082	18,736	21,544		
OTHER DEHY VEG	6,986	15,098	88,022	107,289	106,807	7,193	13,264	85,796	106,258	101,343		
OTHER CAN VEG	13,874	15,361	172,488	172,825	170,672	13,610	14,705	163,813	164,167	167,701		
Subtotal:----	44,324	51,628	483,667	594,794	54,826	57,722	533,476	540,249	672,755			
FROZEN VEGETABLES MT												
BROCCOLI FZN	10,320	12,010	140,467	157,541	169,617	6,038	6,961	83,014	87,294	101,122		
CAULIFLOWER FZN	371	458	22,558	16,389	24,473	261	312	14,555	14,328	15,663		
POTATO FZN	12,962	16,243	132,277	153,622	159,056	8,197	10,336	85,328	94,459	96,764		
OTHER VEG FZN	26,233	16,110	133,477	137,988	129,639	6,802	7,838	89,044	87,163	98,675		
Subtotal:----	49,885	44,820	433,779	465,541	572,786	21,298	25,447	265,741	279,034	312,225		
TREE NUTS MT												
BRAZILS TDT	1,712	6,697	8,703	6,141	10,643	3,115	1,492	15,629	12,334	19,940		
CASHLEWS TOT	4,563	6,128	45,488	47,667	55,279	20,903	30,841	19,636	23,175	24,522		
COCONUT	5,120	3,160	46,305	36,421	58,371	24,249	32,640	37,504	30,000	44,600		
PECANS	4,491	4,492	23,756	23,712	23,595	3,027	2,762	65,326	49,027	72,806		
OTHER NUTS	1,716	1,724	18,560	15,721</td								

## EXPORT NEWS AND OPPORTUNITIES

### **Supplier Credit Guarantee Program announced: \$20 million for Mexico**

On August 20, the United States Department of Agriculture authorized \$20 million in Supplier Credit Guarantee Program (SCGP) sales to Mexico for fiscal year (FY) 1996. This new adaptation of the GSM 102 program is unique because it covers short term financing and may be extended directly by U.S. exporters to foreign buyers for up to 180 days and it only requires that importers obtain a promissory note in case of default on the Commodity Credit Corporation (CCC) backed payment guarantee. Under this announcement coverage of up to 50 percent of the principal is offered on credit terms of 15, 20, 30, 45, and 60 days. No interest coverage is offered under this announcement.

Since this initial announcement was made late in the fiscal year 1996 cycle, and recognizing the benefits of permitting exporters sufficient time to carefully arrange transactions under this new program without facing the pressures of expiring allocation, the CCC offers the following options: 1) exporters may apply by September 30 (the end of FY 1996) provided contractual arrangements call for export no later than November 30, 1996; or 2) exporters may apply after September 30 for any allocation remaining unutilized if their contractual arrangements call for export no later than December 31, 1996.

SCGP is available for the following horticultural products: tree nuts (almonds, pistachios, pecans, and walnuts); fresh fruit (apples, grapes, pears, peaches, plums, nectarines, oranges, lemons, grapefruit, kiwifruit, strawberries, raspberries, and blueberries); dried fruit (raisins and plums); canned fruit (peaches, pears, and fruit cocktail); potatoes (cut and frozen for french fries); fresh vegetables (asparagus, carrots, broccoli, lettuce, and tomatoes); canned vegetables (asparagus, carrots, corn, and tomatoes); frozen vegetables (beans, broccoli, carrots, and corn); wine and brandy.

### **GSM-102 Credit Guarantee Program: Allocations for the East Caribbean Region and Mexico increased by \$10 million and \$25 million, respectively**

Through the GSM-102 Credit Guarantee program, U.S. exporters can be paid by a U.S. bank immediately upon export if an irrevocable letter of credit is opened by the importer's bank and financed by a U.S. bank. The importer's bank then has up to three years to repay the U.S. bank. The following table presents FY 1996 allocations by country by product through September 18, 1996. A distinctive feature of the FY 1996 GSM-102 is the move toward more "commodity basket" programs, i.e., one country allocation under which are listed several commodities and products that may be registered on a first-come, first-serve basis. This structure provides more flexibility to exporters in registering different sizes of shipments under the program. Repayment terms vary under the program, from the standard 3-year to 90-day terms. *Cautionary information for use of the accompanying table: The table reflects only exporter applications for guarantees that have been entered into the GSM-102 computerized system. At any given time, exporter applications are in process, and not all of those received have been entered into the system. Moreover, all applications are initially entered into the system on a provisional basis until the guarantee fee has been received, and the written guarantee has been issued. Thus, some applications now in the system may in the future be removed, and the commodity balances correspondingly increased.* For details on terms and authorizations see the footnotes to the table. Note: applications to include other horticultural commodities and products in GSM-102 programs will be considered by FAS. (For further information on the GSM-102 program for horticultural commodities, contact Robert Knapp, 202-720-4620.)

## FY 1996 GSM-102 Credit Guarantee Coverage 1/

Announced Allocations Country/Commodity	Exporter Applications FY 1996 (\$1,000)	Approved FY 1996 (\$1,000)	Balance (\$1,000)
China Potatoes 2/ Hops and Products	100,000 0 0	0 0 0	100,000 0 0
India Tree nuts 3/	15,000 0	0 0	15,000 0
Indonesia Potatoes 2/ Tree nuts 4/ Fresh fruit 19/ Raisins and dates	160,000 0 0 0	86,400 0 0 0	74,000 0 0 0
Papua New Guinea 5/ Canned Vegetables	1,000 0	0 0	1,000 0
Czech Republic Potatoes 6/ Apples	10,000 0 0	0 0 0	10,000 0 0
Slovakia Frozen Concentrated Orange Juice	10,000 0	0 0	10,000 0
Poland 5/ Potatoes 2/	25,000 0	0 0	25,000 0
Russia 5/ Canned or Frozen Vegetables 7/ Fresh Fruits 8/ Frozen Concentrated Orange Juice	50,000 0 300 0 0 0	49,500 0 300 0 0 0	500 0 0 0
Egypt 9/ Potatoes 6/	160,000 0	109,700 0	50,300 0
Tunisia Almonds/Walnuts Raisins	75,000 0 0	316,000 0 0	43,400 0 0
Southern Africa Region 10/ Tree nuts 4/ Potatoes 2/	50,000 0 0	8,100 0 0	41,900 0 0
East Caribbean Region 11/ Fresh fruit 12/	80,000 0	79,900 0	100 0
Mexico Almonds Fresh Fruits 13/ Hops and Products Potatoes 6/	1,425,000 0 5,100 2,300 0	1,414,100 0 5,100 2,300 0	10,900 0 0 0 0
Andean Region 14/ Tree Nuts and Raisins & Freeze-dried Apples	350,000 0 0	229,200 0 0	120,800 0 0
Central America Region 16/ Potatoes 6/	80,000 0	69,300 0	10,700 0
Argentina Potatoes	20,000 0	0 0	20,000 0
Brazil Fresh Fruit 17/ Potatoes 6/	150,000 0 0	69,200 0 0	80,800 0 0

1/ Coverage announced for FY 1996 as of September 18, 1996 detailed in FAS Program Announcements (tel: 202-690-1621 for information); unless otherwise noted, terms are FOB, 90-days to 3 years; coverage cited for countries includes allocations for all approved agricultural commodities consequently the data do not total. 2/ Cut and frozen for french fries, and potato flakes, 3/ Walnuts, pistachios, almonds. 4/ Almonds, walnuts. 5/ Terms are 90 days to one year; for 1-yr terms for Russia, principal repayments plus accrued interest are due at 6-month intervals; C&F coverage also available to point of first ocean discharge for non-Russian flag carriers (see Program Announcement for details). 6/ Cut and frozen for french fries. 7/ Canned or frozen (corn, peas, mixed vegetables, tomatoes, green beans, and spinach). 8/ Apples, oranges, tangerines, lemons, and pears. 9/ Egypt program (90-day to one year terms) authorized at \$160-million level for FY96 10/ Angola, Botswana, Burundi, Kenya, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Rwanda, Seychelles, South Africa, Swaziland, Tanzania, Uganda, Zaire, Zambia, Zimbabwe. 11/ Barbados, Grenada, Guyana, St. Lucia, St. Vincent and the Grenadines, Suriname, and Trinidad and Tobago. 12/ Apples, grapes, pears, plums, and peaches. 13/ Apples, pears, plums, peaches, nectarines, kiwifruit, and strawberries. 14/ Includes Bolivia, Colombia, Ecuador, Chile, Peru, and Venezuela. 15/ Almonds, walnuts, pistachios, pecans, and hazelnuts; apples, pears, plums, peaches, nectarines, and strawberries. 16/ Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama. 17/ Apples; Brazil coverage is for one-year terms; the FY96 authorization is for \$255 million. 19/ Fresh fruit including apples, grapes, oranges, pears, plums, prunes, cherries, and lemons.

## **U.S. pear exports set another record in 1995/96**

According to the U.S. Census Bureau statistics, U.S. pear exports in marketing year 1995/96 (July/June) reached a record \$82.6 million, up 14 percent from the previous year's value. Expanded sales to Canada and Brazil more than offset lower shipments to Mexico. Sales to Canada, the largest U.S. market, expanded 15 percent to \$31.6 million in 1995/96, due to higher per unit prices. Sales to Mexico, the second largest market, fell 35 percent to \$14.4 million in 1995/96. Exports to Mexico in the first half of the marketing year were adversely affected by the December 1994 peso devaluation, but showed signs of recovery in the second half. Sales to Brazil, the third largest market, more than doubled to \$9.5 million in 1995/96. Market Access Promotion dollars played a pivotal role in the expanded sales to Brazil. Although limited industry funds had been previously used for promotion in Brazil, fiscal year 1996 represented the first significant promotion budget for U.S. pears in Brazil. This budget allowed for in-store promotions to be held for the first time in Brazilian supermarkets. Also, a recent potentially trade-disrupting development involving Brazil's phytosanitary import requirements for pears has been favorably resolved. The resulting agreement will help to ensure continued, uninterrupted access to this important market.

## **U.S. frozen french fry exports continue to sizzle**

The export value of U.S. frozen french fries in marketing year 1995/96 (July-June) was \$256.3 million, up 6 percent over the previous year and more than double the level of 5 years ago. Marketing year 1995/96 marks the 12th consecutive year of increasing value for U.S. french fry exports. Export volume in 1995/96 reached a record 349,937 metric tons, a 7-percent rise over a year ago and more than double the level of 5 years ago. Rising incomes, on-going Market Access Program activities, and increased demand from the food service sectors

in East Asia and Latin America continue to boost U.S. shipments. Shipments to Japan in 1995/96, the leading U.S. customer, jumped 16 percent to \$183.8 million. The next four largest markets consisted of South Korea, Hong Kong, the Philippines, and Taiwan, which together increased 21 percent to \$50.3 million.

## **Korea announces tender for fresh onions and garlic**

On September 16, 1996, the Korean Agricultural and Fishery Marketing Corporation (AFMC) announced a tender for 3,000 metric tons of garlic. The tender was open for public competitive bidding to be delivered at the ports of Pusan, Incheon or Kunsan by October 15, 1996.

On September 17, 1996, AFMC announced a tender for 13,000 metric tons of onions. This tender was also open for public competitive bidding to be delivered at the ports of Incheon, Pusan or Kunsan as follows: 3,000 tons by October 10, 1996; 4,000 tons by October 15, 1996; and 6,000 tons by November 5, 1996. Korea will require an estimated 50,000 tons of onion imports this year, because of a dramatic shortfall in its domestic onion crop in 1996.

## **WORLD TRADE SITUATION AND POLICY UPDATES**

### **Thailand's duty cuts for imported nuts and raisins expected to boost U.S. sales**

Thailand has sharply reduced import duties on imported tree nuts and raisins, according to a recent report from the U.S. Agricultural Counselor in Bangkok. This action responded to FAS's April 1995 proposal to the Thai Ministry of Finance to reduce duties on a variety of horticultural products and Deputy Secretary Rominger's meeting with Thailand's Minister of Finance in September 1995. Specifically, Thailand has reduced the applied duties on a range of tree nuts, including almonds, pistachios, walnuts, and hazelnuts, from about 56 percent to 10 percent ad valorem. The tariff on raisins was

lowered from 57 percent to 30 percent. U.S. exports to date of the affected commodities have been relatively modest - a combined \$1.2 million for the period August 1995 - July 1996 - largely because of the trade-restrictive duty levels. With these lower duties, particularly for tree nuts, it is anticipated that trade will increase significantly. Thailand is a growing market for U.S. horticultural products. For the 12-month period ending July 1996, U.S. horticultural exports to Thailand totaled \$50.4 million, an increase of 20 percent from the comparable period in the preceding year. Apples, which are among the few items to be assessed the low duty rate of 10 percent, accounted for nearly 40 percent of the total value of U.S. horticultural exports to Thailand over the period August 1995 - July 1996.

#### **Indonesian fruit import requirement rumors continue; Indonesian team coming to the United States**

Reports persist that the Government of Indonesia (GOI) may soon impose new import requirements on fruit. The U.S. Department of Agriculture has conveyed its concerns over these reports to various Indonesian government officials in Jakarta, Washington, and Geneva.

Meanwhile, a team of Indonesian officials is scheduled to visit the United States in mid-October to assess U.S. quarantine, inspection, and food safety systems. While the visit is largely focused on addressing problems that Indonesia is encountering with its exports to the United States, the visit provides an opportunity for the U.S. Government to discuss this issue with Indonesian officials. For the 12 month period ending June 1996, U.S. fresh fruit exports to Indonesia reached \$43 million, an increase of 33 percent from the comparable period of a year earlier. The key U.S. export items include apples (accounting for three-fourths of the total), grapes, and oranges.

#### **Guatemala announces new, larger apple import quota**

Effective September 9, 1996, the Government of Guatemala (GOG) established a tariff rate quota (TRQ) of 5,000 metric tons for the importation of apples, far surpassing its previous WTO commitment of 157 tons for apples and pears, according to a report from the U.S. Agricultural Attaché in Guatemala city. The new import law also reduced the apple import tariff from its 20 percent level to an in-quota tariff of 12 percent. The out-of-quota tariff was set at 25 percent. The new policy also eliminates Guatemala's import licensing requirement for apples and allows for imports year round. The GOG had not been fully applying its Uruguay Round (UR) provisions the past two years, which had enabled trade to occur at levels above the minimum levels specified in the UR agreement. As the primary supplier of imported apples, the United States is expected to benefit most from the new policy. Guatemala has become an important market for U.S. apple exporters in recent years. U.S. apple exports to Guatemala in marketing year (July-June) 1995/96 totaled 5,402 tons, valued at \$3.2 million. These figures compared to 197 tons, valued at \$133,078, exported in the 1991/92 season.

#### **Japan opens market to Canadian and Australian tomatoes; access for U.S. tomatoes pending**

Japan has approved imports of tomatoes from both Canada and Australia (Tasmania) during the month of September, according to recent reports from the U.S. Agricultural Minister-Counselor's Office in Tokyo. Japan's government determined in both cases that the products meet the country's phytosanitary import requirements. Meanwhile, the technical review and approval process to allow imports of U.S. tomatoes continues. It is hoped the Government of Japan will complete its internal review and hold the requisite public hearing on the issue within the next several months. This could clear the way for U.S. exporters to commence shipments to this promising market by early next year.

## Walnut Situation and Outlook

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Walnut exports from selected countries in marketing year 1996/97 are forecast to increase 5 percent to a record 189,100 metric tons as Chinese exports are forecast to rise 45 percent. However, China's 1996/97 export potential may be tempered by domestic demand and the quality of the new crop. China's walnut exports fell 20 percent in 1995/96 due to strong domestic demand and a limited supply of high quality walnuts. Although the quantity of U.S. exports in 1995/96 approximated the previous year's level, the value rose 18 percent to \$181 million, due to strong international prices. Japan accounted for the sharpest rise in sales. U.S. exports in 1996/97 are expected to decline about 6 percent, due to the expected smaller harvest and increased competition from China.

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Walnut production in selected countries in 1996/97 is forecast at a record 601,600 tons (inshell basis), up 3 percent from the previous record set last season. An expected 13-percent gain in Chinese output more than offsets production declines in Chile, Italy, and the United States.

Selected country walnut exports in 1996/97 are forecast at a record 189,100 tons, 5 percent above the previous season's revised export estimate. An expected sharp increase in Chinese exports is expected to more than offset a likely reduction in U.S. shipments. The United States and China account for about 75 percent of the world's walnut exports.

### United States

The 1996/97 U.S. walnut crop is estimated at 199,580 tons, down 6 percent from last year. During the most recent tree survey, average nut set per tree was estimated down 8 percent from last year. In addition, heavy drop was reported as a result of last winter's low chilling hours and the significant rain received during May. The final estimate of the 1995/96 harvest is 212,280 tons, up slightly from 1994/95.

The United States exports about half of the walnuts it produces and is the world's largest

exporter. In 1995/96, U.S. walnut exports increased 2 percent. Five main markets accounted for 93 percent of total U.S. 1994/95 inshell exports: the European Union (EU), Canada, Brazil, Israel, and Japan. Retail consumers in these countries often serve inshell walnuts as a snack during various holiday seasons. Meanwhile, food manufacturers in these countries frequently incorporate U.S. shelled walnuts as an ingredient in baked goods, breakfast cereal, confectionary products, and ice cream.

U.S. walnut exports are forecast to decline 6 percent in 1996/97. An expected smaller U.S. crop and competition from likely higher Chinese exports are expected to reduce U.S. exports.

U.S. domestic consumption of walnuts in 1996/97 is forecast at 116,000 tons, 10 percent above the previous season's level. An increase in consumption is likely due in part to the smaller U.S. pecan crop.

### China

China's 1996/97 walnut crop is forecast at a record 260,000 tons, up 13 percent from last year's revised estimate of 231,000 tons. This upward trend in China's walnut production is expected to continue. Walnut prices have been favorable and growers are recognizing the

relationship between higher prices and high quality walnuts, so they are increasing inputs and planting better quality varieties. Because of their resistance to hot, dry weather, walnut trees are being planted in areas that are not suitable for other crops and on less-than-optimal land. Walnut production is spread across China with the provinces of Yunnan, Shanxi, and Shaanxi playing leading roles. Planting of new trees is beginning to slow and growers are instead focusing on improving orchard care and using more and better inputs.

In 1996/97, Chinese exports of walnuts are forecast to increase 45 percent to 45,000 tons based on the expected larger harvest. Some sources forecast exports to double. However, the quality of the new crop and domestic demand will play an important role in determining how much exports will increase. Exports in 1995/96 were down for the third year in a row because of the strong domestic market and the limited supply of high quality walnuts. The walnut quality in most areas of China last year was average to below average because of adverse weather conditions.

Low production costs have permitted the Chinese to compete in the international market. Shelled walnuts continue to comprise the majority of international sales while walnuts in shell are primarily sold domestically. Five markets accounted for 85 percent of China's shipments of shelled walnuts in 1995/96: the European Union, Japan, Hong Kong, Australia, and Canada. Approximately 87 percent of China's inshell walnut exports were purchased by the European Union, Lebanon, North Korea, the United Arab Emirates, and Hong Kong.

Domestic consumption increased sharply in 1995/96 because of strong domestic demand plus the difficulty in exporting lower-quality walnuts. Walnuts are a popular snack among Chinese and many Chinese think walnuts help maintain good health.

### Turkey

Production in 1996/97 is forecast at 66,000 tons, up slightly from last year's crop which was revised downward because of adverse weather. The number of bearing trees is forecast up 3 percent in

1996/97, to 3.5 million, revealing a gradual increase. The Horticultural Research Institute in Turkey has been leading walnut research into improved varieties. Thus far, only a few varieties with higher yields have been planted commercially and are bearing nuts. These seedlings are reportedly in high demand. Because of this, future output is expected to increase steadily as higher yielding varieties are planted and reach bearing age.

Most of the walnuts produced in Turkey are consumed domestically. Official data are not available for total domestic consumption. However, most observers believe that per capita consumption is relatively stable, with much of the increase in aggregate consumption resulting from rising population. Trade sources estimate that growers use about 50 percent of the crop at home with the remainder sold for commercial consumption. Most walnuts are marketed in- shell.

### India

Walnut production in 1996/97 is forecast to expand 16 percent to a record 29,000 tons as a result of favorable weather and a slight increase in the number of bearing trees. Walnuts are produced in the state of Jammu and Kashmir. Since the late-1980's area has expanded to some non-traditional producing areas in the one state where climatic conditions are similar to those in traditional growing areas. Trees in these areas are maturing which is helping to push production higher. Planted area in 1996/97 is forecast at 36,400 hectares, up slightly from 1995/96. The 1995/96 Indian walnut crop decreased 11 percent due to unfavorable weather and the alternate bearing cycle of walnut trees.

In 1996/97, exports of walnuts are forecast to increase 9 percent to 19,000 tons as Indian walnuts could compete more vigorously with Chinese walnuts if quality continues to be a problem for China. Exports in 1995/96 increased 13 percent to 17,500 tons due primarily to improvements in nut quality and packaging for export. At least 90 percent of walnut exports move in vacuum packs with the remainder in cardboard cartons.

Indian walnut consumption in 1996/97 is forecast to increase slightly to 11,000 tons. Ample supplies, anticipated lower retail prices, and the post-harvest onset of the festival season should spur consumption. In India, walnuts are cheaper than other tree nuts. The Indian confectionery and ice cream industries, which have increasing levels of foreign investment, are using more walnuts.

(For further information on supply, distribution, and trade, contact William Janis at 202-720-0897. For further information on U.S. marketing opportunities, contact Stacey Peckins at 202-720-5330. For further information on production, contact Kelly Kirby Strzelecki at 202-720-6791.)

#### France

Production of walnuts in 1996/97 is forecast at 27,000 tons, up 4 percent from 1995/96. The increase is attributed to slightly better weather conditions during the spring blossom and nut set. However, the relatively hot, dry summer limited nut growth. Area planted is estimated at 18,700 hectares, up slightly from last year, and may be the first time in 6 years that plantings have slowed. Production should continue to increase for the next 5 years as older plantings mature and nut production increases.

Exports remain important to the French walnut industry. In 1995/96, walnut exports from France grew 5 percent to 13,900 tons. Walnut exports in 1996/97 are also forecast to increase 4 percent.

#### Italy

Preliminary assessments indicate that Italy will harvest 10,000 tons of walnuts in 1996/97, down 37 percent from 1995/96's relatively large crop. In addition to an off-year in the bearing cycle, wide temperature variations in the spring hampered 1996/97 crop development. Planted and harvested areas, estimated at 4,800 and 4,000 hectares, respectively, continue to decline as trees age and little replanting is done.

Exports play a small role in the Italian walnut industry with imports being far more important. Imports of walnuts in 1996/97 are expected to increase 50 percent to 18,000 tons because of the expected smaller harvest.

The United States supplied 90 percent of Italy's inshell walnuts imports from September 1995 to March 1996. During the same period, Italy imported 26 percent of its shelled walnuts from the United States.

**WALNUTS: PRODUCTION, SUPPLY, AND DISTRIBUTION**  
**(Metric Tons, Inshell Basis)**  
**Marketing Years 1994/95-1996/97 <sup>1/</sup>**

Country/ Marketing Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks	Total Distribution
<b>Chile</b>								
1994/95	180	8,800	71	9,051	7,800	1,101	150	9,051
1995/96	150	9,500	0	9,650	8,400	1,090	160	9,650
1996/97 <sup>2/</sup>	160	10,000	0	10,160	8,800	1,200	160	10,160
<b>China</b>								
1994/95	0	209,997	108	210,105	38,867	171,238	0	210,105
1995/96	0	231,000	63	231,063	31,028	200,035	0	231,063
1996/97 <sup>3/</sup>	0	260,000	40	260,040	45,000	215,040	0	260,040
<b>France</b>								
1994/95	0	29,000	8,100	37,100	13,300	23,800	0	37,100
1995/96	0	25,900	8,000	33,900	13,900	20,000	0	33,900
1996/97 <sup>3/</sup>	0	27,000	7,500	34,500	14,500	20,000	0	34,500
<b>India</b>								
1994/95	3,390	28,000	0	31,390	15,450	10,200	5,740	31,390
1995/96	5,740	25,000	0	30,740	17,500	10,500	2,740	30,740
1996/97 <sup>3/</sup>	2,740	29,000	0	31,740	19,000	11,000	1,740	31,740
<b>Italy</b>								
1994/95	1,000	9,000	17,197	27,197	1,062	25,635	500	27,197
1995/96	500	16,000	12,000	28,500	1,500	26,500	500	28,500
1996/97 <sup>3/</sup>	500	10,000	18,000	28,500	1,000	27,000	500	28,500
<b>Turkey</b>								
1994/95	2,800	66,000	360	69,160	698	64,962	3,500	69,160
1995/96	3,500	65,000	200	68,700	800	64,500	3,400	68,700
1996/97 <sup>3/</sup>	3,400	66,000	200	69,600	800	65,200	3,600	69,600
<b>United States <sup>3/4/</sup></b>								
1994/95	79,080	210,469	794	290,343	104,410	126,285	59,648	290,343
1995/96	59,648	212,283	907	272,839	106,966	105,895	59,978	272,839
1996/97 <sup>4/</sup>	59,978	199,600	1,100	260,678	100,000	116,000	44,678	260,678
<b>TOTAL</b>								
1994/95	86,450	561,266	26,630	674,346	181,587	423,221	69,538	674,346
1995/96	69,538	584,683	21,170	675,392	180,094	428,520	66,778	675,392
1996/97 <sup>4/</sup>	66,778	601,600	26,840	695,218	189,100	455,440	50,678	695,218

<sup>1/</sup> Marketing Years: March-February for Chile; August-July for the United States; September-August for Italy and Turkey; October-September for China, France, and India.

<sup>2/</sup> Data are from a January 1996 report by USDA/Foreign Agricultural Service(FAS).

<sup>3/</sup> Export and import forecasts by USDA/FAS.

<sup>4/</sup> U.S. export and import data come from the Bureau of the Census with forecasts by USDA/FAS.

<sup>5/</sup> For conversion of shelled exports, U.S. domestic shelling ratios of .4327 and .4099 for 1994/95 and 1995/96 originate from calculations of data from the National Agricultural Statistics Service.

FAS converted imports to an inshell basis using a constant recovery rate of 0.4.

## Hazelnut Situation and Outlook

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Hazelnut production in four countries in 1996/97 is forecast to decline 4 percent to 568,144 metric tons, due to sharply reduced harvests in Turkey and the United States. Total exports from the selected countries in 1996/97 are forecast to fall 5 percent to 361,000 tons. A sharp decrease in Turkish exports will likely more than offset a doubling of Italian exports. Strong international demand for high quality U.S. hazelnuts should maintain U.S. exports in 1996/97 close to the previous year's level despite the expected sharp decrease in production, as domestic consumption declines to free up exports.

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Preliminary assessments put 1996/97 hazelnut production in the four countries surveyed at 568,144 metric tons (inshell basis), down 4 percent from 1995/96. The downturn reflects significant declines in Turkey (the world's largest producer) and the United States, which more than offset a 53 percent increase in Italian output. Turkey's hazelnut crop is forecast to decrease 10 percent and the U.S. harvest by 49 percent.

Exports from selected countries in 1996/97 are forecast to decrease 5 percent to 361,000 tons from 1995/96 because of lower production in Turkey. Italian exports could double to 50,000 tons. U.S. exports are expected to approximate last year's level, despite a sharp fall in production, due to strong demand for high quality U.S. hazelnuts, primarily in Germany.

Ending stocks for selected countries in 1996/97 are expected to drop 7 percent. Turkey accounts for the bulk of the decline in stocks. Turkey holds more than 50 percent of the selected country stocks.

### United States

U.S. production of hazelnuts in 1996/97 is forecast at 18,144 tons, 49 percent below the previous year's output. If realized, this hazelnut crop would be the smallest since 1989. A severe December wind storm (which considerably damaged many limbs), freezing weather in February, and flooding adversely affected the crop. Also, cool, wet

weather during pollination limited nut set.

In 1995/96, total exports of U.S. hazelnuts decreased 3 percent to 11,381 tons (inshell basis). The European Union (EU) is the major customer of U.S. hazelnuts, accounting for 67 percent of total 1995/96 sales. Canada bought 8 percent of U.S. inshell hazelnuts, Brazil 6 percent, and Israel and Egypt 3 percent each. The EU, Canada, and Israel have modern food manufacturing industries, which can process shelled hazelnuts into finished ingredients.

U.S. exports of hazelnuts in 1996/97 are forecast to drop 12 percent to 10,000 tons due to the sharply reduced U.S. harvest and heightened competition from likely higher Italian exports. Italian hazelnuts are of quality comparable to U.S. hazelnuts and therefore can easily enter traditional U.S. markets in the EU.

Turkey supplied almost all U.S. imports of hazelnuts, primarily shelled product.

The U.S. bakery, breakfast cereal, and confectionery industries use domestic U.S. and imported hazelnuts. Companies in these sectors often convert shelled hazelnuts to paste for use as an ingredient.

U.S. per capita consumption of hazelnuts has fluctuated according to the product's availability. With higher U.S. hazelnut prices likely because of the short 1996/97 crop, domestic consumption

could fall significantly.

#### Turkey

Turkey's 1996/97 hazelnut harvest is forecast at 410,000 tons, 10 percent below the previous season's output. Weather was normal for most of the early growing season. However, hot, dry weather during June and July adversely affected the crop, reducing yields.

Turkey is by far the world's leading producer of hazelnuts, accounting for about 70 percent of world supply. Hazelnut production is concentrated mainly along Turkey's Black Sea coast. About 60 percent of the crop is produced in the eastern Black Sea region, 15 percent is produced in the central region, and the remaining 25 percent in the western Black Sea region.

The support price for the 1996/97 crop announced by the Government of Turkey is TL 166,000 per kilogram (U.S.\$1.84), up 110 percent in terms of Turkish Lira and up 18 percent in terms of U.S. dollars. While the announced support price is viewed as attractive, it is unknown whether FISKOBIRLIK--the quasi-governmental hazelnut cooperative--will be provided with adequate funds to buy significant quantities of hazelnuts. Earlier government plans to reform grower cooperatives, including FISKOBIRLIK, along more market oriented lines are uncertain because of a recent change in political leadership in Turkey.

Turkey accounts for more than 80 percent of world hazelnut trade. Turkey's hazelnut exports in 1996/97 are forecast to decline for the second year in a row based on the expected smaller harvest. The export tax on hazelnuts continues to be U.S. \$10 per 100 kilograms despite earlier speculation that it might be removed.

Europe is the major market for Turkish hazelnuts. The Hazelnut Exporters Union continues to examine the possibility of expanding exports to new markets in the Far East, North America, including the United States, and countries of the former Soviet Union.

About four-fifths of Turkey's hazelnut exports are comprised of raw kernels and the remaining one-

fifth consists of processed kernels, including roasted, sliced, chopped, paste, meal, and flour. Very little is exported as finished consumer confectionary items. The trend, however, is to move from raw exports to processed and finished products to capture added value. One constraint to increasing exports of hazelnut confectionary items is the relatively low quality of Turkish chocolate (an important base for hazelnut products) compared to European chocolates.

The 1994/95 export estimate was revised upward sharply to a record 432,890 tons based on official statistics. As a result, end-of-year stocks were drawn down significantly. With a tighter market situation, FISKOBIRLIK did not crush hazelnuts for oil in 1995/96, thereby significantly reducing domestic consumption for that year.

#### Italy

Hazelnut production in 1996/97 is forecast at 130,000 tons, up 53 percent from the weather-reduced crop in 1995/96, and considered an average output for an on-year in the production cycle. Italian hazelnut area is expected to be stable in the near future, while production will depend mostly on weather developments, as well as the cyclical fluctuations of the trees. The hazelnut industry is concentrated in four regions with Campania comprising approximately 50 percent of 1996/97 production, Latium, 33 percent, and the remaining output in Piedmont and Sicily.

In 1996/97, exports of hazelnuts from Italy are forecast to double to 50,000 tons based on the expected recovery in production. If prices are competitive, Italian exports are expected to displace Turkish and U.S. sales elsewhere in the European Union.

Italy's hazelnut exports in 1995/96 dropped 34 percent to 25,000 tons due to the smaller harvest. Prices of Italian hazelnuts during 1995/96 were low, due mainly to strong competition from Turkish imports and increased competition in the export market. Prices of shelled hazelnuts averaged about 5,500 lire or U.S. \$3.60 per kilogram. Preliminary expectations of the new crop prices are in line with these levels.

## **Spain**

The 1996/97 Spanish hazelnut crop is forecast at 10,000 tons, down 32 percent from the frost-reduced 1995/96 crop. Catalonia, the major Spanish hazelnut producing region, received excess rains and colder-than-normal weather during the growing season, which adversely affected nut set. The current crop is reportedly of poor quality and small nut sizes. There are indications that many farmers will not harvest their crops due to the low quality, small size of nuts, and competition from imports of Turkish hazelnuts.

The bulk of the hazelnut crop is consumed in shelled form. The confectionery and chocolate industries use about 60 to 70 percent of domestic supplies. Hazelnuts are also used for snacks, and are often marketed in the form of snack packs.

Hazelnuts are domestically marketed throughout the year in competition with almonds, peanuts and other snack foods. In years when almond prices are high, hazelnut demand in the confectionery industry increases.

Exports of hazelnuts from Spain are diminishing, while imports are rising. In 1996/97, Spanish hazelnut exports are forecast at 1,000 tons, down 81 percent from the previous year's shipments.

Imports are expected to reach 10,000 tons in 1996/97, up 5 percent from the previous year.

(For further information on supply, distribution, and trade, contact William Janis at 202-720-0897. For further information on U.S. marketing opportunities, contact Stacey Peckins at 202-720-5330. For further information on production, contact Kelly Kirby Strzelecki at 202-720-6791.)

**HAZELNUTS: PRODUCTION, SUPPLY, AND DISTRIBUTION**  
**(Metric Ton, Inshell Basis)**  
**Marketing Years 1994/95-1996/97 <sup>1/</sup>**

Country/ Marketing Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks	Total Distribution
<b>Italy</b>								
1994/95	15,000	120,000	57,605	192,605	37,794	94,811	60,000	192,605
1995/96	60,000	85,000	50,000	195,000	25,000	105,000	65,000	195,000
1996/97 <sup>F</sup>	65,000	130,000	35,000	230,000	50,000	115,000	65,000	230,000
<b>Spain</b>								
1994/95	100	23,700	8,000	31,800	7,000	21,300	3,500	31,800
1995/96	3,500	14,800	9,500	27,800	5,300	19,800	2,700	27,800
1996/97 <sup>F</sup>	2,700	10,000	10,000	22,700	1,000	19,000	2,700	22,700
<b>Turkey</b>								
1994/95	120,000	525,000	38	645,038	432,890	137,148	75,000	645,038
1995/96	75,000	455,000	18	530,018	340,000	100,018	90,000	530,018
1996/97 <sup>F</sup>	90,000	410,000	0	500,000	300,000	120,000	80,000	500,000
<b>United States <sup>2/ 3/ 4/</sup></b>								
1994/95	1,948	19,142	13,948	35,038	11,788	22,797	453	35,038
1995/96	453	35,381	11,000	46,834	11,381	33,576	1,877	46,834
1996/97 <sup>F</sup>	1,877	18,144	13,800	33,821	10,000	22,861	960	33,821
<b>TOTAL</b>								
1994/95	137,048	687,842	79,591	904,481	489,472	276,056	138,953	904,481
1995/96	138,953	590,181	70,518	799,652	381,681	258,394	159,577	799,652
1996/97 <sup>F</sup>	159,577	568,144	58,800	786,521	361,000	276,861	148,660	786,521

<sup>1/</sup> Marketing Years: July-June for the United States; September -August for Spain, Italy, and Turkey.

<sup>2/</sup> U.S. exports and imports are from the Bureau of the Census with forecasts by the USDA/Foreign Agricultural Service.

<sup>3/</sup> The shelling ratios for U.S. exports for 1994/95 and 1995/96 are 0.4002 and 0.3866 based on calculations from production data of the USDA/National Agricultural Statistics Service. For 1996/97, FAS used the 1995/96 shelling ratio.

<sup>4/</sup> The shelling ratio for U.S. imports for 1994/95 and 1995/96 is 0.4 based on calculations from the USDA/Economic Research Service.

F=Forecast

## Almond Situation and Outlook

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Almond production in six selected countries in 1996/97 is forecast to increase 34 percent to 351,400 metric tons, due to large production upturns in Spain and the United States, the world's two largest producing countries. Selected country exports in 1996/97 are consequently forecast to rise 6 percent. Lower world prices are likely in 1996/97, a situation that should strengthen demand. Although the quantity of U.S. almond exports was down sharply in 1995/96, due to a smaller harvest, the value of shelled and prepared and preserved almond exports reached a record \$870.6 million, up 21 percent from the previous year. Almond prices were up sharply in 1995/96 due to significantly smaller world supplies. Some recovery in the volume of U.S. almond exports is expected in 1996/97 based on the larger harvest, although the United States is expected to face increased competition from Spain.

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Large production increases in the United States and Spain, and smaller increases in Greece and Turkey will likely increase the combined almond output for the six countries surveyed to 351,400 tons (shelled basis)--an increase of 34 percent from 1995/96, but slightly below the previous 5-year average. In Italy and Morocco, the crops are estimated down 60 and 12 percent, respectively.

Selected country almond exports in 1996/97 are forecast to increase 6 percent to 187,800 metric tons based on expected larger production and likely lower prices which should increase demand. Both Spain and the United States are forecast to increase exports.

### United States

The final estimate of U.S. almond production for 1995/96 is 167,831 tons, down 50 percent from 1994/95, because of an off-year in the production cycle and excessive rains especially during the bloom. Production in 1996/97 is forecast up 43 percent, to 240,400 tons, as the production cycle recovers from the previous small harvest. The bloom varied from good to excellent across the growing area in California, but cold weather and intermittent rain during February and March hampered pollination.

The larger 1996/97 U.S. almond crop is expected to stimulate both domestic and export sales due to likely lower prices and greater availability of the product. A larger supply of almonds is expected to boost U.S. exports by 5 percent.

In 1995/96, shelled almonds, including prepared/preserved, accounted for the vast majority, 97 percent, of U.S. exports. Due to the short 1995/96 crop, exports of shelled almonds declined 22 percent. In 1995/96, principal U.S. customers for shelled almonds included the European Union (EU), Japan, Canada, South Korea, and Hong Kong.

Exports of inshell almonds provided the remainder of U.S. almond exports. In 1995/96, exports of inshell almonds plummeted 61 percent by quantity, due again to the diminished U.S. almond crop. Owing to the more discretionary nature of the use of inshell almonds among retail consumers, exports of inshell almonds fell even more than exports of shelled almonds. In 1995/96, major U.S. customers for inshell almonds included India, Brazil, the European Union, Israel, and Hong Kong.

The foreign markets for the different types of U.S. almonds have different characteristics. U.S. shelled almonds often enter markets for food processing ingredients where fewer options are

available to manufacturers. Price and quality play a major role in these transactions. Value-added prepared or preserved almonds must compete in other countries against numerous snack foods and desserts, including bakery goods, confections, and snacks. Meanwhile, cultural preferences for unshelled U.S. almonds influence purchases in particular countries, such as India.

## Spain

Almond production in 1996/97 is forecast at 67,800 tons, up 50 percent from 1995/96, because of increased rainfall following the adverse conditions of dry weather and high temperatures in 1995/96. Both the quality and the kernel size of the 1996/97 almond crop are expected to be good.

The area planted to almonds for 1996/97 increased slightly to 615,000 hectares, of which 595,000 hectares are bearing. Nearly half of Spain's almond crop is produced in the Valencia and Andalucia regions. Between 8 and 10 percent of area planted to almonds is irrigated.

In 1996/97, almond exports from Spain are forecast at 27,300 tons, up 28 percent from the previous year's volume based on likely lower prices and continued strong demand among food manufacturers in the European Union. The vast majority of Spain's almonds are shipped to other EU countries. For example, in 1995/96, EU purchases represented 93 percent of Spanish almond exports.

The United States remains the principal foreign supplier of almonds to Spain. In 1995/96, U.S. almonds constituted 89 percent of total Spanish imports, while other EU countries supplied 9 percent of imports.

In 1996/97, domestic almond consumption in Spain is expected to increase 5 percent to 49,000 tons as industrial demand for almonds recovers from the previous year's slump. Stocks were drawn down sharply in 1995/96 due to the smaller harvest.

The Spanish nougat industry, which uses 70 to 80 percent of the almonds consumed domestically, is the largest in the world. Spanish nougat

manufacturers prefer Spanish to U.S. almonds because of flavor differences and the higher oil content of Spanish almonds. U.S. imports are mainly used for low-priced nougat or marzipan. Millers of almond flour seek U.S. almonds due to their uniformity and low rate of breakage. Almonds compete primarily with hazelnuts and peanuts in Spain's industrial food processing market.

## Turkey

Almond production for 1996/97 is forecast at 15,700 tons, up 15 percent from the reduced 1995/96 estimate of 13,700 tons. The estimate for 1995/96 was revised downward because of early frosts in key growing areas, which adversely affected production. Production is concentrated in the Aegean, Marmara, and Mediterranean regions of Turkey.

The United States accounted for 88 percent of the small quantity of Turkish imports of almonds. Other imports originated from the European Union. Turkey maintains a 5-percent tariff on almonds along with a 35-percent surcharge on the C.I.F. value of almonds.

Almond consumption is growing slowly in Turkey, largely due to the abundant availability of hazelnuts, a close substitute for almonds. Most of the increase in aggregate consumption results from rising population rather than per capita consumption. Almonds generally are consumed whole as a snack food and only limited amounts are utilized in confectionary products.

## Italy

Almond production for 1996/97 is forecast at 6,000 tons, down 60 percent from 1995/96 because of unfavorable weather and declining production capacity of the trees. Intense, continuous rains in the producing areas of Apulia and Sicily from February through April, combined with freezing temperatures in late-winter have resulted in the lowest expected output in the last 2 decades. Concurrently, harvested area has been trending downward--from 102,459 hectares in 1994/95 to an estimated 93,000 hectares in 1996/97. Numerous uprootings occur each year

because of the declining productivity of older trees.

In the late-1960's, output averaged over 40,000 tons. In recent years, the crops have ranged from 12,000 to 20,000 tons as growing competition from California and Spain eroded profits, thereby limiting the farmers' incentive and financial ability to maintain their orchards.

In 1996/97, Italian exports of almonds are forecast to decrease more than 50 percent to 1,000 tons due to the reduced harvest. In 1995/96, other EU countries accounted for 90 percent of Italian almond exports. The current EU export subsidy for almonds exported to third countries is 180 lira (12 U.S. cents) per kilogram.

In 1996/97, Italy's almond imports are forecast to rise by more than 50 percent to 10,000 tons. In 1995/96, the United States accounted for 53 percent of total Italian imports. Because of a smaller harvest, Spain lost its place as the leading supplier to the Italian almond market. The current EU ad valorem customs duty for shelled almonds is 2 percent for imports within the EU-wide quota of 90,000 tons and 6.8 percent for imports over quota.

In 1996/97, Italian consumption of almonds is expected to decline 22 percent to 15,000 tons, continuing a downward trend which began in the early 1990's. Most almonds enter the food manufacturing sector as an ingredient. However, the processing industry has replaced, when technically possible, almonds with hazelnuts, depending on prices. For example, the domestic market situation during the last few months has been characterized by record high almond prices and relatively low hazelnut prices, which has pushed the confectionary industry to shift from one nut to the other.

## Greece

Almond production in 1996/97 season is forecast at 15,000 tons, up 15 percent from the previous harvest. Improved weather from last year has boosted output in 1996/97, as area harvested remained stable at 41,500 hectares.

In 1996/97, Greek exports of almonds are expected to plummet 53 percent to 400 tons. In 1995/96, other EU countries purchased 94 percent of Greek almond exports.

Greece's almond imports in 1996/97 are expected to remain at least year's level. Other EU countries supply most of Greece's imports.

## Morocco

Sweet almond production in 1996/97 is forecast at 6,500 tons, down 12 percent from the upwardly revised 1995/96 estimate. Abundant rainfall from November 1995 to April 1996 considerably reversed the stress on the trees caused by last year's drought and was expected to result in a good crop. However, excess rainfall during May caused the number of fruit per tree to drop significantly. Area harvested is estimated up slightly in 1996/97, to 9,000 hectares, of which about 50 percent is irrigated.

Local demand for sweet almonds consumes most Moroccan production. Morocco exports some sweet almonds, mainly to Libya. Imported almonds sometimes make up for shortfalls in the domestic market.

Historically, Morocco's imports of almonds have been insignificant. Nevertheless, with a reduced 1996/97 harvest, Morocco may import up to 100 tons of almonds.

(For further information on supply, distribution, and trade contact William Janis at 202-720-0897. For information on U.S. marketing opportunities, contact Stacey Peckins at 202-720-5330. For information on production, contact Kelly Kirby Strzelecki at 202-720-6791.)

**ALMONDS: PRODUCTION, SUPPLY AND DISTRIBUTION**  
**(Metric Tons, Shelled Basis)**  
**Marketing Years 1994/95-1996/97 <sup>1/</sup>**

Country/ Marketing Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks	Total Distribution
<b>Greece</b>								
1994/95	3,803	16,000	1,000	20,803	1,800	15,600	3,403	20,803
1995/96	3,403	13,000	1,000	17,403	850	15,400	1,153	17,403
1996/97 <sup>F</sup>	1,153	15,000	1,000	17,153	400	15,500	1,253	17,153
<b>Italy</b>								
1994/95	1,000	14,000	9,569	24,569	1,973	22,096	500	24,569
1995/96	500	15,000	6,500	22,000	2,200	19,300	500	22,000
1996/97 <sup>F</sup>	500	6,000	10,000	16,500	1,000	15,000	500	16,500
<b>Morocco</b>								
1994/95	1,600	5,743	28	7,371	20	6,800	551	7,371
1995/96	551	7,400	6	7,957	0	7,000	957	7,957
1996/97 <sup>F</sup>	957	6,500	100	7,557	0	7,000	557	7,557
<b>Spain</b>								
1994/95	7,700	70,260	18,600	96,560	28,600	49,560	18,400	96,560
1995/96	18,400	45,300	12,600	76,300	21,400	46,500	8,400	76,300
1996/97 <sup>F</sup>	8,400	67,800	7,500	83,700	27,300	49,000	7,400	83,700
<b>Turkey</b>								
1994/95	2,900	15,700	346	18,946	158	15,788	3,000	18,946
1995/96	3,000	13,700	300	17,000	100	14,400	2,500	17,000
1996/97 <sup>F</sup>	2,500	15,700	200	18,400	100	15,800	2,500	18,400
<b>United States <sup>2/3/4/</sup></b>								
1994/95	46,539	333,394	181	380,114	203,260	83,958	92,896	380,114
1995/96	92,896	167,831	253	260,980	151,990	66,897	42,093	260,980
1996/97 <sup>F</sup>	42,093	240,400	330	282,823	159,000	77,740	46,083	282,823
<b>TOTAL</b>								
1994/95	63,542	455,097	29,724	548,363	235,811	193,802	118,750	548,363
1995/96	118,750	262,231	20,659	401,640	176,540	169,497	55,603	401,640
1996/97 <sup>F</sup>	55,603	351,400	19,130	426,133	187,800	180,040	58,293	426,133

<sup>1/</sup> Marketing Years: July-June for the United States, Morocco; August-July for Tunisia; September-August for Spain, Italy, Turkey; October-September for Greece.

<sup>2/</sup> U.S. import data are from Bureau of Census with input from the Almond Board of California (ABC). Import forecast originates with USDA/Foreign Agricultural Service.

<sup>3/</sup> U.S. export and stock data for 1994/95 and 1995/96 come from the Almond Board of California; 1996/97 export forecast based on preliminary data from the Almond Board of California ; 1996/97 stock estimate from the ABC.

<sup>4/</sup> U.S. production forecast by USDA/National Agricultural Statistics Service in Noncitrus Fruits and Nuts: 1995 Summary.

## Production and Trade of Fresh Cut Flowers in Selected Countries

U.S. exports of cut flowers and nursery products (CFNP) in 1995, valued at \$193 million, declined for the second consecutive year. CFNP exports, which peaked at \$209 million in 1993, registered the largest declines in 1995 in the Netherlands and Germany. Canada, the European Union and Mexico accounted for about 85 percent of the total export value in 1995. Cut flowers, valued at \$40 million, were up 6 percent, while nursery products were down 4 percent from 1994. Imports of fresh cut flowers into the United States continue to gain market share. In 1995, imports of fresh cut flowers were valued at \$512 million, up 22 percent from 1994 and 59 percent from 1991. Colombian flowers continued to represent the bulk of all U.S. flower imports, followed by the Netherlands, a distant second.

### United States

Roses, carnations, pompon and standard chrysanthemums, gladiolus (spikes), and orchids are commercially the most important cut flowers in the United States

Most cut flowers, chiefly carnations and roses, in the United States are produced year round in greenhouses, and/or in some sort of building structure. Fresh cut flowers not grown under greenhouses or other types of structures are referred to as field flowers and include gladiolus, daisies, statice, and snapdragons. In recent years, pompons have gained in popularity as a cash crop item and are grown by many farmers throughout the United States in open fields.

In calendar year 1995, production of roses, carnations, chrysanthemums, and gladiolus (spikes) in the United States totaled 692 million stems, down 15 percent from 1994, and 40 percent below 1992. The decline is due primarily to import competition.

#### Wholesale values of top cut flowers declined in 1995

According to the National Agricultural Statistical Service (NASS), the wholesale value of total cut flowers produced in the United States in 1995 was \$409 million, down 8 percent from 1994 and 4 percent below the value in 1993.

### California tops U.S. flower producing states

California continues to be the leading producer of cut flowers, accounting for 62 percent of the total U.S. wholesale value in 1995. Other important producing states include: Florida, Colorado, Hawaii, Michigan, New Jersey, New York, Minnesota, Ohio, Pennsylvania, Oregon, and Washington state. Of the 36 states NASS surveyed in 1995, 14 recorded higher wholesale values, while 21 recorded lower values over the previous year.

Hybrid tea (standard) roses, valued at \$114 million, accounted for about 28 percent of the total cut flower production sales in 1995. Gladioli's were valued at \$36 million; followed by standard carnations, \$17 million; pompons (mums), \$17 million; sweetheart roses, \$11 million; miniature carnations, \$11 million; and standard chrysanthemums, \$8 million.

Official U.S. Department of Agriculture production statistics are available only for selected varieties of fresh cut flowers, and are based on the actual numbers of flowers sold in 28 states prior to 1992, and 36 states from 1992 forward and include only commercial production.

#### U.S. Market News reports a declining trend in the volume of cut flower imports

U.S. Imports of fresh cut flowers in 1995 totaled

4.17 billion stems valued at \$512 million, down 5 percent in volume but up 22 percent in value from 1994. The decline in volume was attributed mainly to fewer imports of carnations. In 1995, Colombian flowers accounted for 63 percent of the value of all U.S. imports. Traditionally, Colombian flowers account for the lion's share of U.S. total imports annually.

**Americans buy only half as many cut flowers as the Japanese and Italians, a third as many as the Swiss**

Fresh cut flower sales to consumers in the United States have traditionally been made by retail florists for use in weddings, funerals, get-well gifts, special occasions such as Mother's Day, etc. In recent years, there has been a relatively large increase in sales of fresh cut flowers through mass marketers such as supermarkets, garden stores, flower stands and street vendors.

**U.S. exports of cut flowers reached record level in 1995**

In 1995, U.S. exports of fresh cut flowers registered a record value of \$40.3 million, up 6 percent from 1994. U.S. flowers were shipped to more than 39 countries. The top four markets were Canada, \$18.0 million; Mexico, \$9.4 million; Japan, \$7.2 million; and the Netherlands, \$2.1 million. These four markets accounted for approximately 90 percent of the total U.S. export value in 1995. About 60 percent of all U.S. flower exports originate from California.

**U.S. exports of cut flowers for the first 6 months of 1996 valued at \$24 million are on track to establish a new export record value this year**

With the influx of fresh cut flowers entering the United states from abroad, the cut flower industry in the United States is beginning to branch out into foreign markets to expand sales. From 1991 to 1993, the California Cut Flower Association (CCFA) conducted several small floral marketing programs in Taiwan, Japan and Hong Kong through the Western United States Agricultural Trade Association with some reported success. In 1996, the CCFA received Market Access Program funds through the California Agricultural Export Council and plans to

conduct floral marketing activities in Canada. The focus of the CCFA plan will be to educate the Canadian trade about U.S. flowers and educate U.S. shippers on how to deal with the export market.

**U.S. exports of nursery products down**

In 1995, U.S. exports of nursery products valued at \$153 million, declined for the second consecutive year. Reduced exports to the Netherlands and Germany were the primary reason for the decline. Principal nursery product items included trees, tree parts, shrubs, bushes, herbaceous plants, nursery stock, bulbs and corms, etc. Canada, The European Union, and Mexico accounted for 87 percent of the total value. Other important but smaller markets including Japan, Ecuador, Hong Kong, the Caribbean, other western Europe, and the Middle East accounted for the balance of U.S. nursery product exports.

On February 14, 1994, the U.S. Floral Trade Council, with the support of Roses Incorporated, filed an anti-dumping petition with the International Trade Administration (ITA), U.S. Department of Commerce, and the International Trade Commission (ITC) concerning imports of fresh cut roses from Colombia and Ecuador.

In March 1995, the U.S. International Trade Commission, based on the record developed in above investigation," determined that an industry in the United States is neither materially injured nor threatened with material injury by reason of imports of fresh cut roses from Colombia and Ecuador that are sold in the United States at less than fair value (LTFV).

**Colombia**

**Colombia is the world's second largest producer of fresh cut flowers**

In value terms, cut flowers are now Colombia's third most important agricultural export crop--after coffee and bananas. Production of fresh cut flowers in Colombia in 1995 totaled 156,000 metric tons, up 3 percent from 1994. Most production is in greenhouses covering 4,400 hectares with only about 45 hectares are

produced on open fields. Greenhouses are generally constructed of wooden frames and covered with plastic sheeting. Approximately 89 percent of Colombia's greenhouses are on the outskirts of Bogota, with 7 percent near Medellin, and 4 percent in the Cali area.

In 1995, carnations accounted for 44 percent of total cut flower production, followed by roses with 21 percent, and pompons at 16 percent. Nearly all of the carnations, roses, alstroemerias, and gypsophila are grown near Bogota.

**Cut flower production in Colombia is forecast to grow by about 5 percent per year through 2001**

Cut flowers in Colombia are produced on about 460 farms owned by about 260 individuals and sold by about 300 exporters. The floriculture industry in Colombia employs about 75,000 in direct jobs, which includes 70 percent women, and generates another 50,000 indirect jobs.

Asocolflores (Flower Growers Association), the only flower grower association in Colombia, was organized in 1971 and has about 240 members or about 90 percent of all the Colombian flower producers.

**Greater productivity emphasized**

In recent years, greater emphasis has been placed on gaining more productivity from the same planted area than on placing flowers of higher value in world markets. While production has increased an average of 7 percent each year during the last 6 years, area has expanded an average of only 3 percent each year.

**The lack of Colombia's plant variety protection has limited production growth**

One limitation that Colombian flower growers have faced in obtaining higher yielding varieties is that Colombia had no plant variety protection legislation. As a result, many foreign breeders were reluctant to sell their newest flower varieties to Colombia. Also, the lack of plant variety protection hindered development of new domestic varieties. However, on March 9, 1994, Colombia issued decree No. 533 which

established regulations that were in accordance with the UPOV (International Union for the Protection of Varieties of Plants) rules, which should improve the situation.

**Production costs**

Labor costs account for 42 percent of total production costs. Other costs include: energy, 11 percent; cuttings for propagation, 15 percent; packing, 6 percent; chemicals, 7 percent; plastic sheeting, 3 percent; and other costs, 16 percent. In 1995, total production costs in U.S. dollars rose 19 percent, and a similar increase is expected in 1996. The fixed investment cost per hectare of flowers is \$71,400 or \$28,900 per acre.

**Domestic consumption**

About 5 percent of Colombia's flower production goes to the domestic market. In general, flowers that do not meet export quality specifications are sold on the domestic market. When export quality flowers are sold in the domestic market, their price is four times what domestic flowers normally cost.

**Export outlook**

In 1995, Colombia was the world's second largest exporter of cut flowers in volume after the Netherlands. Colombia accounts for about 11 percent of the world export market for cut flowers, compared to the Netherlands' 59 percent, including shipments to other EU member states.

**Total export value for 1996 expected to reach US\$492 million**

The export value of Colombian flowers in 1995 reached US\$460 million, up 20 percent from US\$382 million in 1994.

Colombia exports more carnations than any other country. Colombian exports of flowers by variety to the United States are as follows: standard carnations, 95 percent; miniature carnations, 68 percent; pompon chrysanthemums, 75 percent; and roses, 51 percent.

**Colombia: Cut Flowers Area, Production and Exports**  
**Calendar Years**

Items	1991	1992	1993	1994	1995*
Hectares					
<b>Area</b>	<b>4,111</b>	<b>4,242</b>	<b>4,173</b>	<b>4,304</b>	<b>4,445</b>
Greenhouse	4,070	4,200	4,130	4,260	4,400
Open	41	42	43	44	45
Metric tons					
<b>Production</b>	<b>101,537</b>	<b>131,188</b>	<b>139,589</b>	<b>147,473</b>	<b>154,000</b>
Carnations, mini.	0	13,824	15,571	31,186	33,000
Carnations, std.	45,439	49,385	49,435	32,887	35,000
Chrysant., std.	3,404	2,660	2,340	1,947	3,000
Chrysant., pom.	25,137	23,684	24,334	23,535	25,000
Roses	15,831	23,499	28,539	31,171	33,000
Others	11,726	18,136	19,372	23,746	25,000
<b>Exports</b>	<b>96,460</b>	<b>124,629</b>	<b>132,610</b>	<b>138,101</b>	<b>146,500</b>
Carnation, mini.	0	13,133	14,792	29,627	31,500
Carnation, std.	43,167	46,916	46,963	31,243	33,000
Chrysant., std.	3,234	2,527	2,223	2,702	3,000
Chrysant., pom.	23,880	22,500	23,117	22,358	24,000
Roses	15,039	22,324	27,112	29,612	31,000
Others	11,140	17,229	18,403	22,559	24,000
Value (US\$1,000)					
<b>Total Exports</b>	<b>228,886</b>	<b>340,896</b>	<b>382,226</b>	<b>429,810</b>	<b>460,000</b>

\* Estimate. Note: Totals are shown in bold print.

Source: Flower Growers Association (ASOCOLFLORES), Dane (National Statistics Bureau), and U.S. Agricultural Attache, Bogota.

#### Air freight helps develop U.S. flower market

The growth of Colombian fresh cut flowers exports to the United States was facilitated by the development of speedy and reliable air freight service and by a sophisticated flower receiving infrastructure at the Miami International Airport. More Colombian flower exporters are bypassing the common marketing channel, the Miami importer, to capture extra profit by cutting out one link in the distribution chain.

Colombian cut flower industry has been aggressively seeking new markets by shipping approximately 6 percent of its flower business to 32 additional countries

Colombian cut flower exports to the United States account for approximately 80 percent of its flower trade, with the remainder going mostly to countries in the EU, which accounted for 14 percent in 1995. Cut flower exports to the United Kingdom during the same period

accounted for 6 percent; Germany, 3 percent; and Canada and Spain, 2 percent each.

#### **Colombians work to penetrate Japanese flower market**

Since 1988 Colombia has been working to increase its penetration into the Japanese flower market. Colombian flower exports to that market have increased from 36 tons in 1988 to 450 tons in 1995. Almost all the flowers exported to Japan have been carnations--miniature and standard.

The major problem for Colombia in shipping flowers to Japan has not been freight costs, but phytosanitary inspection delays, which adversely affect market life of the flowers.

The Japanese government has agreed to establish a branch office of its health inspection service at the Bogota airport to pre-clear flower shipments to Japan. Asocolflores estimates that Colombian flower exports to Japan could expand to about \$100 million a year.

#### **Shipments to the United States could be pre-cleared**

The United States Animal and Plant Health Inspection Service (APHIS) is also in the process of establishing a pilot project in Bogota to pre-clear flower shipments to the United States. Such a program would save money for both the Colombian exporters and APHIS.

#### **Policy situation**

Colombian flowers exported to the United States are duty-free under the Andean Trade Preference Act (ATPA). Cut flowers account for about 60 percent (by value) of the Colombian exports under ATPA.

Colombian flower producers also want the Andean Pact group to join Mercosur, another free trade and economic group, which includes Argentina and Brazil, two important flower markets.

**On January 1, 1997, the European Union will eliminate import duties on fresh flower imports from Colombia--until that time, fresh cut flower imports from Colombia to the EU are subject to seasonal import duties (20 percent from June 1 to October 31, and 14.2 percent from November 1 to May 31). The EU also applies a 16.7 percent duty on non-fresh flowers**

Previously, Colombian flower exports to the EU were subject to seasonal import duties of 24 percent for July 1 to September 30, and 17 percent for October 1 to June 30.

#### **White rust disease restricts movement of chrysanthemums from some Colombian farms**

In 1988, the Animal and Plant Health Inspection Service of the U.S. Department of Agriculture discovered white rust--a disease that attacks chrysanthemums--in a shipment of Colombian flowers arriving in Miami. In response, ICA (the Colombian Agricultural Institute) ordered all flowers from the Bogota farm where the disease originated to be incinerated and its soils chemically treated. Also, imports of flower cuttings from countries where white rust exists were prohibited and a Colombian farm monitoring system was put into operation with the cooperation of Asocolflores.

White rust is discovered once or twice a year in farms in the Bogota area. In August 1989, ICA prohibited the production of two chrysanthemum varieties--Super White and Super Yellow--which are particularly susceptible to white rust.

#### **Netherlands**

#### **The Netherlands is the world's largest producer and exporter of fresh cut flowers**

In 1995, area devoted to cut flowers totaled 6,168 hectares of which 3,669 hectares were under glass greenhouses and 2,500 hectares in open fields. In 1996, flower production area is estimated at 6,170 hectares. Detailed production information by flower type and

volume is not available.

### **Flower marketing**

In the Netherlands, the Aalsmeer flower market, a cooperative of about 5,000 flower growers, is the largest flower auction site in the world. Reportedly, flower products are shipped to Aalsmeer from some of the world's largest flower producers for assessment by the auction's 2,500 buyers.

At the Aalsmeer market, flowers are sold via the auction clock and by negotiated deals between large buyers--supermarket chains, etc. and large growers or groups of growers. Often the auctions act as an intermediary in these negotiated deals.

### **Export situation**

Fresh cut flowers exported from the Netherlands in 1995 were valued at US\$2.8 billion, up 22 percent from 1993 and 73 percent from 1985. In 1995, Dutch exporters expressed concern that the export value of cut flowers to Germany, Holland's most important export destination, stagnated for the first time. While the demand for Dutch flowers in the western part of Germany decreased slightly in 1995, a modest growth in eastern Germany did not compensate for that loss.

The Netherlands largest export growth in 1995 took place in France, up 12 percent from 1994, and in east European countries--Czech Republic, Slovenia, Croatia and Russia.

### **Dutch expenditures on flowers and plants lagging behind other sectors**

In 1995, Dutch consumer expenditures for cut flowers, potted plants and ornamental products, decreased 1 percent from the year earlier. Higher consumer costs for vacations, municipality taxes and very successful company savings plans for employees (tax benefits) have left less money available for consumers to spend in retail stores, including the flower shops. Also, slower economic growth in Germany, the Netherlands leading export market, is another reason for the decline in domestic demand for cut flowers.

### **Costa Rica**

**Cut flowers and ferns remain the third most important agricultural export category behind bananas and coffee**

According to ACOFLOR (Association of Costa Rican Flower Exporters), current area planted to flowers (not tropical) in Costa Rica is estimated at about 300 hectares, all under greenhouses. Area planted to tropical flowers and ornamental plants is estimated by the Costan Rican Ministry of Agriculture at about 4,500 hectares.

The majority of the flowers are grown in the Central Valley provinces of San Jose, Heredia, and Alajuela. Production takes place year round. The lower areas of the valley provinces provide the best growing conditions for flowers. Tropical flowers are grown mostly on the Atlantic side of the country in open fields. Ferns are grown in the highlands of Alajuela and Cartago, all under plastic covering.

Total area planted to ferns (leather leaf) is estimated at about 1,000 hectares, all under plastic covering. There are approximately 40 fern growers in Costa Rica, with about 5 companies controlling the largest share of the export market. Many independent growers sell their product to larger companies for export. Ferns are exported by air and sea.

According to ACOFLOR, the main obstacle that faces Costa Rican flower and fern exporters is inadequate infrastructure, especially at Costa Rica's international airport--resulting in losses to exporters.

### **Export values for cut flowers, ornamental plants, and foliage up**

In 1995, exports of cut flowers, ornamental plants and foliage from Costa Rica were valued at US\$112 million, up 17 percent from 1994.

Exports of fresh cut flowers and ornamentals from Costa Rica in 1995 combined for a total value of US\$63.5 million, up 14 percent from 1994. Exports of foliage for the same period were valued at US\$48.9, up 22 percent from 1994.

Exports of flowers from January to June 1996 were up 7 percent as compared to the same period in 1995. According to CENPRO (Center for Export Promotion), flower exports are expected to grow in the future but at a slower pace than in the past few years. On the other hand, exports of tropical flowers, ornamentals and foliage are expected to continue growing at a stronger pace. For the period indicated above, ornamental plants grew 18 percent, while exports of foliage grew 28 percent.

#### **The United States continues to be the primary market for Costa Rica's cut flower exports**

In 1995, exports of Costan Rican cut flowers were valued at US\$22.2 million, up 7 percent from 1994. Chrysanthemums, lilies, roses, and gingers were the primary flowers exported. The main market for Costan Rican ferns was the European Union (mostly the Netherlands and Germany).

### **Germany**

**While Germany is perhaps the world's largest and most important import market for floricultural products, with annual sales estimated at US\$5.5 billion, it is also a significant producer of flowers and ornamental plants**

Since the reunification of Germany in 1990, domestic sales of floricultural products have grown by nearly 25 percent. Annual turnover in the German wholesale floricultural market is presently estimated at US\$5.5 billion.

Production of floricultural products in Germany include cut flowers, potted plants, garden and balcony plants. The production of potted plants, garden and balcony plants has increased both in terms of quantity and value. In the case of cut flowers, the quantity produced has declined, but the value has increased.

#### **Import market**

Germany is perhaps the largest importer of floricultural products in the world. Between 1990 and 1995, German floricultural imports averaged US\$2.0 billion per annum. The Netherlands dominates this import market with

an average share of nearly 75 percent. Other major suppliers include the United States, Costa Rica, Italy, Denmark and Kenya. The United States is the largest non-EU supplier of floricultural products to Germany, mostly cut greenery and foliage. While the United States maintains a market share of less than two percent of the German floricultural market, U.S. exports to Germany have averaged about US\$38 million per year from 1990 to 1995.

#### **Phytosanitary requirements**

EU phytosanitary regulations for imports of floricultural products are contained in the EU Directive 77/93/EEC. The Directive provides detailed listings of harmful organisms whose introduction is prohibited. Generally, plants must be free of pests and diseases not endemic to the EU. Special phytosanitary certification is required for plants which are shipped in soil or other growing media containing soil.

**There are no specific labeling requirements beyond general product identification (e.g., name, weight and number)**

Companies selling product in Germany must provide assurances that the product packaging can be properly recycled or disposed of. Generally, this is done under contract with the German Dual system, a company with limited liability. U.S. exporters may rely on their German importer for assistance in this area.

### **Ecuador**

#### **Near perfect weather continues to boost cut flower production in Ecuador**

The cut flower industry in Ecuador has diversified from producing mainly roses, carnations, and chrysanthemums into producing gypsophilias, pompon chrysanthemums, statices and other flowers.

In 1995, production of cut flowers in Ecuador is estimated at 20,300 metric tons on about 600 hectares. About 75 percent of the total production area is under greenhouses, and the balance in open fields. Traditionally, over 90

percent of Ecuador's total cut flower production is exported.

**Strong consumer demand for roses has helped Ecuador to become a distant third-ranked player in the U.S. market**

In 1995, exports of cut flowers from Ecuador is estimated at 22,000 tons, up 16 percent from 1994. Roses accounted for about 50 percent of total exports; carnations, chrysanthemums, and gypsophilas accounted for most of the remaining cut flower exports.

**Flower packaging**

In Ecuador, one metric ton of fresh cut flowers is equivalent to about 59 boxes of 17 kilograms each. The stem equivalent of each 17 kilogram box varies by flower variety: *Roses*, 13 bunches x 25 units equals 325 stems; *chrysanthemums*, 25 bunches x 10 units equals 250 stems; *carnations*, 25 bunches x 25 units equals 625; *statice*, 40 bunches x 10 units equals 400 stems; and *pompon chrysanthemums*, 40 bunches x 6 units equal 240 stems.

*For further information, please contact Emanuel McNeil at (202) 720-2083.*

**Carnations: U.S. Production, Imports, Percent Imports of Production, Growers**

Type and Year	Production 1/ 1,000 stems	Imports 1,000 stems	Import Value in 1,000 Dollars	Percent Imports of Total Supply	Total Number of Growers
<b>Miniature 2/</b>					
1991	133,956	373,536	23,121	74	134
1992	116,472	384,276	23,448	77	123
1993	112,536	439,464	22,737	80	115
1994	86,088	491,472	25,893	85	93
1995	111,708	486,552	33,377	81	101
<b>Standard</b>					
1991	197,580	1,027,929	48,726	84	149
1992	213,599	1,153,855	62,660	84	139
1993	204,926	1,252,734	62,347	86	119
1994	116,232	1,072,920	64,755	90	92
1995	113,801	863,388	80,089	88	92
<b>Total</b>					
1991	331,536	1,401,465	71,847	81	na
1992	330,071	1,538,131	86,108	82	na
1993	317,462	1,692,198	85,084	84	na
1994	202,320	1,564,392	90,648	85	na
1995	225,509	1,349,940	113,466	86	na

1/ Production statistics are based on actual numbers of flowers sold in 28 states prior to 1992, and 36 states from 1992 forward, includes commercial production only.

2/ Revised from bunches to stems (12 stems = one bunch). na = not available.

Source: Inspections by Plant Protection and Quarantine Office, APHIS, USDA, as reported by the Federal-State Market News Service, the National Agricultural Statistics Service, Crop Reporting Board, USDA, and the U.S. Department of Commerce, Bureau of the Census.

**Chrysanthemums: U.S. Production, Imports, Percent Imports of Production, Growers**

Type and Year	Production 1/ 1,000 stems	Imports 1,000 stems	Import Value in 1,000 Dollars	Percent Imports of Total Supply	Total Number of Growers
<b>Pompon 2/</b>					
1991	124,488	552,546	46,331	82	175
1992	92,616	562,470	54,336	86	152
1993	68,298	611,520	54,795	90	139
1994	72,636	609,492	55,497	89	142
1995	79,614	536,326	65,941	87	131
<b>Standard</b>					
1991	22,138	32,849	8,878	60	120
1992	19,775	33,826	7,962	63	152
1993	20,944	29,570	14,396	58	139
1994	15,303	35,676	9,036	70	121
1995	14,130	43,591	9,192	75	113
<b>Total</b>					
1991	146,626	585,395	55,209	80	na
1992	112,391	596,296	62,298	84	na
1993	89,242	641,090	69,191	88	na
1994	87,939	645,168	64,533	88	na
1995	93,744	579,917	75,133	86	na

1/ Production statistics are based on actual numbers of flowers sold in 28 states prior to 1992, and 36 states from 1992 forward, includes commercial production only. 2/ Revised from bunches to stems (one bunch = 6 stems). na = not available.

Source: Inspections by Plant Protection and Quarantine Office, APHIS, USDA as reported by the Federal-State Market News Service, the National Agricultural Statistics Service, Crop Reporting Board, and the U.S. Department of Commerce, Bureau of the Census.

**Roses: U.S. Production, Imports, Percent Imports of Production, Growers 1/**

Type and Year	Production 1,000 stems	Imports 1,000 stems	Import Value in 1,000 Dollars	Percent Imports of Total Supply	Total Number of Growers
<b>Hybrid Tea (Standard)</b>					
1991	447,797	496,987 2/	89,476	53	219
1992	458,974	568,821 2/	89,882	55	224
1993	430,819	687,637 2/	106,622	61	213
1994	404,938	722,793 2/	124,362	64	200
1995	349,491	744,937 2/	150,931	68	175
<b>Sweetheart</b>					
1991	88,748	5,020 3/	2,218	5	146
1992	74,588	5,746 3/	560	7	133
1993	80,430	6,946 3/	770	8	126
1994	64,551	7,301 3/	1,302	10	109
1995	44,749	7,525 3/	1,209	14	94
<b>Total</b>					
1991	536,545	502,007	91,694	48	na
1992	533,562	574,567	90,442	52	na
1993	511,249	694,583	107,392	58	na
1994	469,489	730,094	125,664	61	na
1995	394,240	752,462	152,140	66	na

1/ Production statistics are based on the actual numbers of flowers sold in 28 states prior to 1992, and 36 states from 1992 forward, includes commercial growers only. 2/ U.S. imports of roses provided by the Market News Service are only available by total and not by type. Therefore, number used in this table are based on the Bureau of the Census 3-year average, 1993-1995, that 99 percent of total roses imported in the United States are standard roses. 3/ These numbers are a residual of the total and standard roses imported.

Source: Inspections by Plant Protection and Quarantine Office, APHIS, USDA as reported by the Federal-State Market News Service, the National Agricultural Statistics Service, Crop Reporting Board, and the U.S. Department of Commerce, Bureau of the Census.

**Cut Flowers: U.S. Imports by Country of Origin, Calendar Years 1991-95**  
**(1,000 stems)**

Type and Country	1991	1992	1993	1994	1995
<b>Carnations</b>	<b>1,027,929</b>	<b>1,153,855</b>	<b>1,252,734</b>	<b>1,072,920</b>	<b>863,388</b>
Colombia	988,135	1,115,375	1,213,506	1,033,343	820,638
Ecuador	14,164	14,926	18,487	19,024	20,881
Guatemala	5,601	6,950	4,759	4,689	5,591
Mexico	12,285	10,457	11,262	7,933	8,041
Netherlands	2,337	3,476	2,158	3,791	3,090
Peru	2,484	203	347	758	761
Others	2,923	2,468	2,215	3,382	4,386
<b>Carnat., Minia.1/</b>	<b>373,536</b>	<b>384,276</b>	<b>439,464</b>	<b>491,472</b>	<b>486,552</b>
Colombia	295,248	339,888	411,324	465,840	449,652
Costa Rica	3,948	948	--	--	--
Ecuador	21,804	11,844	11,052	10,488	13,200
Mexico	6,564	9,864	10,632	8,244	14,772
Peru	24,744	18,252	4,632	240	672
Israel	17,664	--	--	--	--
Spain	--	--	--	2,268	4,284
Others	3,564	3,480	1,824	4,392	3,972
<b>Chrysanthemums</b>	<b>33,172</b>	<b>33,826</b>	<b>29,570</b>	<b>35,676</b>	<b>43,591</b>
Colombia	27,054	27,630	22,512	28,081	35,830
Dominican Rep.	740	492	441	476	461
Ecuador	2,237	2,752	3,167	3,638	3,700
Netherlands	2,849	2,641	2,658	2,907	2,844
Costa Rica	--	--	--	408	562
Mexico	--	--	--	111	98
Others	292	311	762	55	96
<b>Chry., Pompon 3/</b>	<b>552,546</b>	<b>562,470</b>	<b>611,520</b>	<b>609,492</b>	<b>536,326</b>
Colombia	478,614	493,182	537,306	546,702	514,944
Costa Rica	59,016	60,702	65,082	53,490	44,514
Dominican Rep.	2,136	672	--	594	96
Ecuador	8,598	7,062	6,870	7,932	8,586
Others	4,182	852	2,262	1,368	186
<b>Roses</b>	<b>502,007</b>	<b>571,703</b>	<b>694,583</b>	<b>730,094</b>	<b>752,462</b>
Bolivia	3,350	3,024	2,199	2,167	1,509
Colombia	350,441	398,204	490,192	503,760	453,277
Costa Rica	7,604	7,348	6,325	5,855	7,059
Dominican Rep.	3,364	3,428	3,168	2,835	2,634
Ecuador	57,956	82,828	113,097	132,903	181,365

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**Cut Flowers: U.S. Imports by Country of Origin, Calendar Years 1991-95**  
**(1,000 stems) (Continued)**

Type and Country	1991	1992	1993	1994	1995
Guatemala	23,533	27,885	29,935	35,949	40,097
Mexico	43,005	35,580	35,420	32,202	46,161
Netherlands	10,280	11,879	11,240	11,438	16,230
Peru	--	--	--	840	745
Others	2,474	1,527	3,007	2,145	3,385
<b>Astroemeria</b>	<b>83,343</b>	<b>92,164</b>	<b>104,989</b>	<b>130,310</b>	<b>146,331</b>
Colombia	80,054	89,203	101,598	126,584	142,793
Netherlands	2,499	2,373	2,310	2,425	2,440
Ecuador	--	--	--	720	459
Mexico	--	--	--	337	547
Others	790	588	1,081	244	92
<b>Chamaedorea 2/</b>	<b>399,725</b>	<b>443,775</b>	<b>385,925</b>	<b>285,125</b>	<b>285,225</b>
Guatemala	60,075	61,400	62,300	63,400	55,550
Mexico	336,775	381,525	323,050	220,850	227,375
Others	2,875	850	575	875	2,300
<b>Daisies</b>	<b>19,848</b>	<b>4,766</b>	<b>8,196</b>	<b>11,268</b>	<b>414</b>
Colombia	822	--	--	539	344
Mexico	19,001	4,545	8,101	10,704	56
Others	25	221	95	25	14
<b>Freesia</b>	<b>23,528</b>	<b>25,353</b>	<b>27,700</b>	<b>28,127</b>	<b>32,688</b>
Colombia	1,388	1,560	2,207	5,029	8,462
Netherlands	22,066	23,627	25,215	22,750	23,959
Mexico	--	--	--	282	264
Others	74	166	278	66	3
<b>Gerbera</b>	<b>32,350</b>	<b>34,807</b>	<b>37,679</b>	<b>42,168</b>	<b>48,146</b>
Colombia	26,106	28,662	28,544	32,657	36,952
Costa Rica	409	415	344	323	119
Dominican Rep.	1,061	821	763	445	14
Israel	841	895	1,598	2,280	4,187
Netherlands	3,507	3,679	5,855	5,899	6,078
Mexico	--	--	--	285	613
Others	426	335	597	279	183
<b>Gladioli</b>	<b>4,158</b>	<b>5,029</b>	<b>4,701</b>	<b>8,365</b>	<b>12,095</b>
Mexico	2,505	3,210	3,090	6,607	6,524
Netherlands	1,473	1,638	1,401	1,206	1,207
Ecuador	--	--	--	443	4,104
Others	180	181	210	109	260

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**Cut Flowers: U.S. Imports by Country of Origin, Calendar Years 1991-95  
(1,000 stems) (Continued)**

Type and Country	1991	1992	1993	1994	1995
<b>Gypsophila 4/</b>	<b>114,310</b>	<b>151,840</b>	<b>180,060</b>	<b>198,730</b>	<b>197,740</b>
Colombia	47,060	56,470	65,390	79,820	60,940
Ecuador	45,280	61,590	93,190	103,640	119,490
Peru	14,740	13,550	9,860	8,110	7,010
Others	7,230	10,450	11,620	7,160	10,30
<b>Iris</b>	<b>20,813</b>	<b>21,366</b>	<b>20,956</b>	<b>20,206</b>	<b>22,565</b>
Colombia	103	162	--	--	402
Netherlands	20,460	21,067	20,555	19,820	21,526
Costa Rica	--	--	--	175	179
Others	250	137	401	84	458
<b>Leatherleaf</b>	<b>32,225</b>	<b>19,074</b>	<b>10,798</b>	<b>12,279</b>	<b>11,643</b>
Costa Rica	31,441	17,826	8,831	6,665	3,423
Mexico	--	6	958	5,249	6,523
Others	784	1,242	1,009	365	1,697
<b>Lilac</b>	<b>619</b>	<b>710</b>	<b>691</b>	<b>695</b>	<b>801</b>
Netherlands	617	709	678	693	782
Others	2	1	13	2	19
<b>Lilies</b>	<b>32,149</b>	<b>35,081</b>	<b>35,966</b>	<b>38,810</b>	<b>35,989</b>
Colombia	2,105	2,343	2,076	2,688	994
Costa Rica	1,692	2,933	3,198	4,201	2,241
Netherlands	27,589	28,513	27,326	27,814	27,499
Chile	--	--	--	2,447	1,811
Others	763	1,292	3,366	1,660	3,444
<b>Misc. Greens</b>	<b>23,309</b>	<b>24,075</b>	<b>36,885</b>	<b>32,792</b>	<b>34,075</b>
Costa Rica	7,860	9,231	11,670	15,388	13,830
Israel	5,400	3,353	2,446	2,690	3,127
Italy	3,928	4,016	4,107	3,706	4,270
Jamaica	320	542	463	390	342
Mexico	3,253	5,675	16,114	4,460	5,606
Thailand	319	401	254	378	209
France	--	--	--	2,131	3,098
Others	2,229	857	1,831	3,649	3,593
<b>Orchids, Cybidiums</b>	<b>4,503</b>	<b>5,979</b>	<b>4,653</b>	<b>4,882</b>	<b>6,289</b>
Netherlands	3,211	3,495	3,037	3,708	4,351
New Zealand	702	1,209	1,511	596	1,672
Thailand	--	--	--	461	--
Others	590	1,275	105	117	266

(Continued Next Page)

**Cut Flowers: U.S. Imports by Country of Origin, Calendar Years 1991-95  
(1,000 stems) (Continued)**

Type and Country	1991	1992	1993	1994	1995
<b>Orchids, Other</b>	<b>22,413</b>	<b>14,094</b>	<b>23,341</b>	<b>21,864</b>	<b>23,968</b>
Netherlands	283	290	331	228	892
Singapore	160	--	--	393	403
Thailand	21,889	13,493	22,599	20,803	22,503
Others	81	311	411	440	170
<b>Statice 5/</b>	<b>86,940</b>	<b>75,140</b>	<b>114,380</b>	<b>116,660</b>	<b>128,660</b>
Colombia	38,490	32,340	42,300	36,310	31,890
Ecuador	12,740	12,110	10,930	13,000	13,780
Mexico	27,930	24,770	54,370	55,590	56,770
Peru	4,400	720	1,720	2,710	80
Others	3,360	5,200	4,140	8,990	26,140
<b>Tulips</b>	<b>52,054</b>	<b>60,519</b>	<b>57,842</b>	<b>65,294</b>	<b>65,679</b>
France	1,421	1,257	2,193	2,951	2,707
Netherlands	50,249	58,995	55,411	62,081	61,977
Others	384	267	238	262	995
<b>Other Ornament.</b>	<b>270,670</b>	<b>251,510</b>	<b>319,774</b>	<b>417,798</b>	<b>442,333</b>
Colombia	108,050	118,355	156,551	225,401	228,429
Costa Rica	31,895	28,535	36,043	47,572	53,541
Dominican Rep.	23,536	11,016	15,739	13,871	12,733
Ecuador	10,678	11,724	17,853	32,659	41,992
Guatemala	3,681	5,054	4,401	8,395	9,382
Australia	--	--	--	8,910	6,026
Honduras	3,133	2,784	2,982	1,015	474
Jamaica	5,319	4,026	2,492	2,416	3,246
Mexico	14,511	16,184	21,385	19,748	25,203
Netherlands	30,449	28,796	32,413	33,719	33,322
Peru	14,014	2,576	1,860	1,546	1,395
Others	25,404	22,460	28,055	22,546	26,590
<b>All Total Stems</b>	<b>3,712,147</b>	<b>3,971,412</b>	<b>4,402,407</b>	<b>4,375,027</b>	<b>4,176,960</b>

1/ Revised from bunches to stems (one bunch = 12 stems). 2/ Revised from bunches to stems (one bunch = 25 stems). 3/ Revised from bunches to stems (one bunch = 6 stems). 4/ Revised from bunches to stems (one bunch = 10 stems). 5/ Revised from bunches to stems (one bunch = 10 stems). Note: (--) equals not available or zero.

Source: Inspections by Plant Protection and Quarantine Office, APHIS, USDA as reported by the Federal-State Market News Service; the National Agricultural Statistics Service, Crop Reporting Board, USDA; and the Department of Commerce, Bureau of the Census.

**United States: Imports Of Fresh Cut Flowers**  
(\$1,000 dollars)

Origins	1991	1992	1993	1994	1995
Colombia	202,877	231,397	251,837	270,219	321,273
Netherlands	49,439	51,080	53,460	57,116	61,162
Mexico	15,390	11,898	13,930	15,368	23,191
Costa Rica	10,180	10,029	11,639	15,060	14,979
Ecuador	12,442	15,244	19,575	26,080	50,498
Peru	3,648	2,316	1,082	538	582
Thailand	4,506	4,378	4,275	4,323	4,606
Canada	3,783	4,133	4,584	5,772	7,455
Israel	2,056	1,610	1,828	2,094	3,029
Guatemala	3,699	5,335	5,033	6,597	7,376
Australia	2,078	2,898	2,614	2,808	2,405
France	2,431	2,253	2,047	2,025	2,370
Italy	1,029	1,332	1,128	823	1,058
Dominican Rep.	1,341	1,639	1,872	1,510	1,172
Taiwan	209	227	109	7	11
Jamaica	881	597	160	130	169
Others	6,027	6,000	7,009	9,634	10,188
Total	322,016	352,366	382,182	420,104	511,524

Source: U.S. Department of Commerce, Bureau of the Census.

**United States: Exports of Cut Flowers and Nursery Products**  
(\$1,000)

Destinations	1991	1992	1993	1994	1995
<b>Nursery Products:</b>	<b>167,742</b>	<b>168,816</b>	<b>170,297</b>	<b>160,072</b>	<b>152,985</b>
Canada	88,541	85,911	81,009	82,782	82,353
Netherlands	22,422	21,337	27,239	19,334	17,473
Germany	22,997	20,988	21,048	16,652	12,870
Mexico	8,220	11,820	11,192	16,268	11,053
Japan	4,492	4,187	4,045	4,663	4,716
Bel-Lux	3,643	5,393	6,851	1,400	4,293
United Kingdom	1,036	1,360	2,052	1,199	1,945
Switzerland	1,554	1,578	1,519	1,235	1,268
Hong Kong	314	307	478	1,003	1,053
Colombia	639	1,244	606	833	998
United Arab Em.	1,157	518	1,228	812	643
Others	12,727	14,173	13,030	13,891	14,320
<b>Cut Flowers:</b>	<b>33,699</b>	<b>32,505</b>	<b>39,100</b>	<b>37,913</b>	<b>40,314</b>
Canada	15,757	17,479	19,259	19,349	18,048
Mexico	4,235	2,897	4,764	5,530	9,481
Japan	4,874	4,974	6,564	6,343	7,236
Netherlands	3,393	1,861	2,606	2,349	2,109
Germany	2,090	1,713	2,548	1,503	954
Switzerland	544	673	651	612	427
Venezuela	71	342	508	356	132
Korea	61	59	93	200	181
Others	2,674	2,507	2,107	1,671	1,746
<b>Grand Total</b>	<b>201,441</b>	<b>201,321</b>	<b>209,397</b>	<b>197,985</b>	<b>193,299</b>

Source: U.S. Department of Commerce, Bureau of the Census. Note: Totals are in bold print.

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION  
MARKETING YEAR BEGINNING AS INDICATED  
JUL 96

COMMODITY AND COUNTRY	COUNTRY REGION	QUANTITY								VALUE (1,000 DOLLARS)								
		CURR LAST	MO YR	CURR LAST	MO YR	YR LAST	TDT	CURR LAST	MO YR	CURR LAST	MO YR	YR LAST	TDT	CURR LAST	MO YR	YR LAST		
FRESH FRUIT																		
FR APPLES(JUL)	MT	3,489	1,885	3,489	1,885	101	650	2,025	1,185	2,025	1,185	72,448						
TAIWAN		9,176	7,651	9,176	7,651	80	802	4,728	3,934	4,728	3,934	41,697						
MEXICO		5,803	5,965	5,803	5,965	78	790	4,233	4,811	4,233	4,811	62,246						
CANADA																		
HONG KONG		7,283	2,787	7,283	2,787	49	741	4,336	1,821	4,336	1,821	31,788						
INDONESIA		6,350	5,403	6,350	5,403	49	455	3,673	4,220	3,673	4,220	33,534						
EU_15		3,058	2,764	3,058	2,764	35	480	1,914	1,868	1,914	1,868	21,366						
OTHER		8,818	7,096	8,818	7,096	166	636	5,497	4,731	5,497	4,731	104,109						
Subtotal:-----		43,977	33,552	43,977	33,552	562	555	26,406	22,570	26,406	22,570	367,188						
FR PEARS(JUL)	MT	2,279	2,565	2,279	2,565	44	348	2,108	2,470	2,108	2,470	31,557						
CANADA		1,074	2,225	1,074	2,225	28	430	618	1,131	618	1,131	14,384						
MEXICO		0	84	0	84	21	747	0	77	0	77	9,522						
BRAZIL		0	15	0	15	11	582	0	20	0	20	5,090						
EU_15		0	0	0	0	0	0	0	0	0	0	0						
TAIWAN		91	0	91	0	11	438	38	0	38	0	6,655						
OTHER		184	84	184	84	25	768	162	70	162	70	15,361						
Subtotal:-----		3,628	4,973	3,628	4,973	143	313	2,926	3,768	2,926	3,768	82,570						
APRICOTS(MAY)	MT	460	339	2,428	2,182	2,679	593	545	3,330	3,111	3,330	3,111	3,632					
CANADA		0	0	190	207	431	0	0	611	186	611	186	796					
EU_15		121	14	273	83	324	82	4	223	60	223	60	289					
MEXICO		0	0	0	0	222	0	0	0	0	0	0	611					
HONG KONG		46	150	151	205	596	102	73	198	157	198	157	773					
OTHER		627	504	3,042	2,677	4,252	778	621	4,361	3,514	4,361	3,514	6,102					
FR CHERRIES(MAY)	MT	2,490	2,604	17,088	13,087	17,183	14,576	13,931	109,961	79,814	109,961	79,814	110,610					
JAPAN		1,518	3,058	3,090	4,885	9,184	4,813	8,593	7,445	12,619	7,445	12,619	12,873					
CANADA		1,698	2,138	3,301	4,594	3,492	3,978	5,039	8,435	12,220	8,435	12,220	8,773					
NETHERLANDS		198	789	741	1,536	3,233	245	892	752	1,754	752	1,754	2,712					
BELGIUM-LUXEMBOU		4	119	510	2,982	2,826	20	168	409	329	409	329	2,804					
TAIWAN		803	1,465	2,032	2,967	2,120	2,023	4,161	6,139	9,953	6,139	9,953	6,428					
OTHER		662	1,263	1,446	2,271	1,714	1,624	3,569	3,880	7,437	4,364	7,437	4,364					
Subtotal:-----		7,170	10,529	26,957	27,803	33,692	27,012	35,293	135,860	122,043	135,860	122,043	143,048					
PEACH-NECTRN(MAY)	MT	11,739	12,771	28,706	30,046	40,277	11,490	13,071	30,575	30,643	30,575	30,643	42,457					
CANADA		2,792	1,153	2,984	1,657	11,693	1,095	535	1,229	828	1,229	828	5,164					
MEXICO		2,967	4,775	5,150	9,866	9,818	3,346	5,725	5,848	10,564	5,848	10,564	11,033					
TAIWAN		717	2,160	1,652	4,554	4,785	628	1,849	1,427	4,391	1,427	4,391	4,001					
OTHER		18,214	20,858	38,454	46,124	66,534	16,559	21,179	39,036	46,426	39,036	46,426	62,612					
PLUM-PRUNES(MAY)	MT	4,302	7,434	8,291	12,514	14,364	5,843	5,198	12,201	11,643	12,201	11,643	20,733					
CANADA		5,715	5,864	7,328	7,224	14,000	5,463	5,057	7,088	6,143	7,088	6,143	15,084					
HONG KONG		1,436	4,836	1,558	5,364	5,459	1,561	3,930	1,822	4,425	1,822	4,425	6,119					
OTHER		1,311	3,016	1,944	4,217	4,590	1,637	2,463	1,895	3,924	1,895	3,924	4,969					
Subtotal:-----		12,764	21,150	18,821	29,320	38,413	14,503	16,648	23,007	26,135	23,007	26,135	46,905					
FR AVOCADOS(OCT)	MT	58	87	5,681	4,903	8,266	148	82	5,132	3,872	5,132	3,872	7,016					
EU_15		49	0	3,490	2,778	5,243	134	0	3,049	294	3,049	294	4,300					
FRANCE		278	387	1,841	2,500	2,086	536	954	3,466	5,157	3,466	5,157	3,960					
JAPAN		121	76	1,696	1,959	1,958	168	121	1,627	1,022	1,627	1,022	1,969					
CANADA		0	56	1,001	3,377	1,303	0	45	928	2,495	928	2,495	1,166					
NETHERLANDS		9	13	935	935	1,228	14	15	945	847	945	847	1,180					
UNITED KINGDOM		9	18	137	118	181	15	27	218	246	218	246	284					
OTHER		466	570	9,355	8,480	12,490	867	1,183	10,443	10,297	10,443	10,297	13,229					
FR KIWI FRUIT(OCT)	MT	126	71	3,831	2,224	4,021	137	76	4,652	2,788	4,652	2,788	4,885					
CANADA		0	0	2,959	1,572	2,559	0	0	4,282	2,640	4,282	2,640	4,282					
KOREA, REPUBLIC		18	0	1,995	1,509	1,395	26	0	2,140	831	2,140	831	2,140					
TAIWAN		18	10	1,397	885	1,430	25	12	1,735	955	1,735	955	1,778					
OTHER		161	82	9,282	5,190	9,505	188	88	12,809	7,214	12,809	7,214	13,084					
FRESH GRAPES (MAY)	MT	8,894	9,356	20,587	17,291	103,704	13,116	12,391	30,972	27,153	30,972	27,153	118,691					
CANADA		385	1,665	773	1,929	30,319	602	2,390	1,040	2,719	1,040	2,719	40,706					
HONG KONG		190	154	499	212	12,897	294	198	675	253	675	253	16,002					
MEXICO		44	81	44	102	12,813	51	68	51	87	51	87	12,074					
OTHER		2,977	4,696	7,530	8,694	67,159	3,732	6,847	10,623	14,738	10,623	14,738	90,470					
Subtotal:-----		12,490	15,953	29,434	28,228	226,892	17,794	21,895	43,361	44,950	43,361	44,950	277,943					
FR STRAWBRIES(JAN)	MT	4,464	2,594	29,101	32,768	37,075	5,253	2,844	39,348	41,761	39,348	41,761	51,078					
CANADA		1,103	1,063	2,225	1,869	6,653	3,343	3,688	7,122	6,646	7,122	6,646	24,166					
JAPAN		561	832	574	946	3,002	481	787	492	881	492	881	2,396					
MEXICO		561	311	864	1,929	2,696	984	939	2,136	5,427	2,136	5,427	6,343					
EU_15		422	311	446	474	4,242	428	227	99									

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION  
MARKETING YEAR BEGINNING AS INDICATED  
JUL 96

COMMODITY AND COUNTRY	COUNTRY REGION	QUANTITY						VALUE (1,000 DOLLARS)						
		CURR LAST	MO CURR	MO	YR TOT	YR LAST	TOT	CURR	MO	YR TOT	YR LAST	MO	YR TOT	
CANNELED FRUIT														
CNO PEARS(JUN)	MT	172	315	354	617	5,669	155	364	314	651	5,086			
CANADA		85	32	169	90	623	70	34	182	80	589			
JAPAN		31	70	91	106	1,023	24	43	77	84	995			
OTHER		Subtotal:-----	288	417	613	813	7,315	249	440	572	815	6,670		
CNO PINEAPPLE(JAN)	MT	35	49	825	305	1,130	29	49	768	300	1,021			
CANADA		112	30	539	765	959	110	30	550	792	964			
EU_15		75	16	622	390	855	55	16	490	348	665			
GERMANY		75	16	482	158	696	55	16	374	155	532			
MEXICO		3	16	33	32	184	3	14	24	28	142			
OTHER		6	32	417	519	489	9	34	423	436	496			
Subtotal:-----	230	144	2,436	2,010	3,618	206	143	2,255	1,903	3,288				
FRT MIXTURES(JUN)	MT	337	506	743	1,086	5,531	416	615	940	1,341	6,954			
CANADA		475	153	692	286	4,313	563	190	789	340	5,012			
PHILIPPINES		286	90	763	576	4,163	313	118	910	660	4,855			
JAPAN		150	37	628	204	3,124	161	48	681	274	3,495			
SINGAPORE		261	109	687	307	2,793	262	132	735	339	3,192			
HONG KONG		303	292	875	727	6,342	302	284	994	864	7,421			
OTHER		Subtotal:-----	1,812	1,187	4,388	3,186	26,266	2,017	1,387	5,049	3,819	30,930		
ORIEO FRUIT														
ORO RAISINS(AUG)	MT	4,751	5,789	57,471	56,132	57,471	7,216	9,277	89,847	91,112	89,847			
EU_15		2,632	3,163	27,824	27,630	27,824	3,828	5,150	42,083	44,647	42,083			
UNITED KINGDOM		2,163	1,914	24,527	25,038	24,527	3,123	2,914	35,608	39,409	35,608			
CANADA		785	809	10,946	10,447	10,946	1,652	1,636	22,187	21,000	22,187			
GERMANY		726	1,067	8,184	9,210	8,184	1,133	1,583	12,000	14,128	12,000			
OTHER		1,865	1,980	27,927	27,007	27,927	2,833	3,245	46,450	47,596	46,450			
Subtotal:-----	9,563	10,493	120,871	118,624	120,871	14,825	17,072	194,093	199,116	194,093				
ORO PRUNES(AUG)	MT	2,648	2,230	33,645	34,588	33,645	6,706	5,246	82,871	80,958	82,871			
EU_15		934	1,369	13,614	13,183	13,614	2,202	3,075	28,583	30,245	28,583			
JAPAN		830	893	10,549	11,492	10,549	2,224	2,247	25,549	26,842	25,549			
GERMANY		592	175	6,521	6,593	6,521	1,490	427	17,101	16,373	17,101			
ITALY		482	461	4,943	5,489	4,943	1,068	849	10,596	11,449	10,596			
UNITED KINGDOM		210	291	4,320	4,167	4,320	530	636	10,271	9,782	10,271			
CANADA		416	870	8,235	9,731	8,235	901	1,894	17,546	20,682	17,546			
OTHER		4,208	4,760	59,815	61,669	59,815	10,339	10,850	140,933	140,006	140,933			
FRUIT JUICES(SSE)														
ORANGE JUICE(CNC)(OEC)	KL	42,018	55,713	117,461	128,381	148,694	12,197	8,136	47,991	39,545	59,417			
EU_15		26,884	5,923	51,360	45,560	65,493	7,569	2,599	24,842	17,933	29,793			
NETHERLANDS		1,511	46,622	33,498	65,932	42,004	599	4,114	11,485	12,687	14,383			
FRANCE		2,415	1,915	20,354	18,729	31,993	4,253	3,589	34,521	32,378	53,116			
CANADA		205	1,415	14,087	12,751	19,230	319	1,408	8,467	8,872	10,999			
KOREA, REPUBLIC		1,065	5,949	11,851	40,081	18,017	1,575	2,922	9,071	21,537	12,347			
JAPAN		6,749	3,312	46,011	35,270	71,989	2,666	1,621	20,709	14,748	31,600			
OTHER		52,453	68,304	209,765	235,213	289,923	21,010	17,576	120,758	117,081	167,479			
ORANGE JUICE(NTCNC)(OEC)	KL	7,632	8,631	56,902	70,868	88,874	5,342	5,865	41,168	50,367	64,450			
CANADA		137	3,126	35,564	21,200	40,805	91	2,157	19,863	14,226	22,965			
EU_15		0	2,352	21,914	11,785	23,918	0	1,624	11,882	7,816	13,154			
BELGIUM-LUXEMBOURG		48	646	8,769	6,266	11,324	31	428	5,221	4,375	6,715			
UNITED KINGDOM		1,396	2,623	14,814	17,044	23,107	1,051	2,206	10,787	13,375	16,933			
OTHER		9,165	14,380	107,280	109,113	152,786	6,483	10,228	71,818	78,568	104,348			
GRPFRT JUICE(CNC)(OEC)	KL	4,152	2,385	19,009	20,412	26,579	1,770	1,753	12,789	11,656	16,416			
EU_15		3,369	1,065	12,293	7,300	15,777	1,404	1,836	9,699	4,979	11,070			
NETHERLANDS		1,565	2,451	10,948	16,484	14,625	1,382	2,098	10,827	13,716	14,377			
JAPAN		0	79	4,399	317	4,496	0	57	1,348	245	1,371			
ARGENTINA		155	214	2,779	870	3,910	107	153	1,229	514	1,953			
GERMANY		198	44	2,412	4,337	3,553	60	32	743	1,242	1,257			
ISRAEL		582	851	3,429	5,366	5,617	720	876	4,736	5,783	7,557			
OTHER		6,498	5,811	40,197	46,917	54,870	3,932	4,816	30,444	32,642	40,678			
FRESH VEGETABLES														
FR ASPARAGUS(OCT)	MT	356	263	9,572	5,922	10,410	1,139	1,476	42,055	25,670	44,501			
JAPAN		122	217	5,410	4,373	5,577	353	594	13,678	12,014	14,163			
CANADA		10	123	971	1,246	1,247	36	353	2,717	4,065	3,340			
EU_15		1	2	1,083	1,982	1,083	3	12	3,958	6,567	3,960			
SWITZERLAND		28	35	213	174	227	99	101	810	658	854			
OTHER		517	641	17,248	13,696	18,544	1,631	2,537	63,218	48,975	66,818			
FR ONIONS(OCT)	MT	3,104	2,425	127,333	63,652	142,128	941	802	37,500	14,837	41,391			
JAPAN		14,055	10,773	95,278	89,138	111,727	4,981	4,090	40,794	31,596	45,284			
CANADA		1,859	1,042	44,545	25,405	57,412	806	336	14,704	8,475	18,352			
OTHER		19,018	14,239	267,156	178,196	311,267	6,728	5,228	92,998	54,908	105,026			
CANNELED VEGETABLES														
CNO SWT CORN(AUG)	MT	5,202	5,536	58,455	45,654	58,455	4,391	4,753	50,065	36,581	50,065			
JAPAN		3,961	4,391	41,755	46,309	41,755	2,867	3,240	31,506	35,341	31,506			
EU_15		471	2,412	15,315	21,174	15,315	409	2,085	14,279	18,564	14,279			
TAIWAN		1,157	1,584	14,333	18,415	14,333	818	1,185	10,642	14,218	10,642			
GERMANY		1,925	1,244	13,583	13,042	13,583	1,422	868	10,460	10,029	10,460			
UNITED KINGDOM		638	1,104	12,437	17,451	12,437	497	906	10,484	14,333	10,484			
HONG KONG		3,379	3,140	38,380	35,753	38,380	2,847	2,617	32,879	29,581	32,879			
OTHER		13,651	16,583	166,342	166,341	166,342	11,012	13,601	139,213	134,401	139,213			
CNO TOMATOES(JUL)	MT	2,488	3,454	2,488	3,454	45,326	2,107	2,709						

U S EXPORTS OF SELECTED COMMODITIES BY DESTINATION  
MARKETING YEAR BEGINNING AS INDICATED  
JUL 96

COMMODITY AND COUNTRY		QUANTITY						VALUE (1,000 DOLLARS)					
COUNTRY REGION		CURR LAST	MO YR	CURR LAST	MO YR	YR TDT LAST	YR TDT CURR	YR TDT CURR	YR TDT LAST	YR TOT CURR	YR TOT YR	LAST YEAR	
<b>CANNED VEGETABLES</b>													
CND TOM SAUCE(JUL)	MT	4,792	5,901	4,792	5,901	54,007	4,163	4,932	4,163	4,932	49,485		
CANADA		265	275	265	275	6,116	243	337	243	337	6,143		
JAPAN		134	293	134	293	5,305	207	450	207	450	5,929		
EU_15		766	1,091	766	1,091	14,992	887	1,071	887	1,071	15,589		
OTHER													
Subtotal:-----		5,957	7,561	5,957	7,561	80,420	5,501	6,790	5,501	6,790	77,147		
<b>FRZN VEGETABLES</b>													
FRZN SWT CORN(JUL)	MT	2,735	3,322	2,735	3,322	40,120	2,647	3,098	2,647	3,098	35,756		
JAPAN		262	321	262	321	3,872	222	209	222	209	2,878		
HONG KONG		306	295	306	295	3,323	244	244	244	244	2,852		
CANAOA		1,013	409	1,013	409	11,658	821	329	821	329	9,012		
OTHER													
Subtotal:-----		4,316	4,346	4,316	4,346	58,972	3,934	3,880	3,934	3,880	50,498		
<b>FZN F FRY(JUL)</b>													
FZN F FRY(JUL)	MT	16,222	14,602	16,222	14,602	183,767	11,635	10,830	11,635	10,830	135,152		
JAPAN		1,413	1,398	1,413	1,398	21,956	1,074	892	1,074	892	15,721		
KOREA, REPUBLIC		2,421	1,893	2,421	1,893	21,136	1,607	1,269	1,607	1,269	13,999		
HONG KONG		16,505	10,519	16,505	10,519	123,078	12,064	7,776	12,064	7,776	91,407		
OTHER													
Subtotal:-----		36,561	28,412	36,561	28,412	349,937	26,380	20,767	26,380	20,767	256,280		
<b>TREE NUTS</b>													
ALMONDS UNSH(JUL)	MT	222	727	222	727	6,323	550	1,764	550	1,764	15,128		
INDIA		503	0	503	0	4,669	1,289	0	1,289	0	12,500		
JAPAN		153	173	153	173	3,457	322	381	322	381	8,031		
EU_15		50	20	50	20	1,178	122	10	122	10	2,883		
GERMANY		28	21	28	21	2,331	84	54	84	54	5,655		
OTHER													
Subtotal:-----		907	921	907	921	16,779	2,245	2,199	2,245	2,199	41,315		
<b>ALMND SH/PREP(JUL)</b>													
EU_15	MT	9,695	13,385	9,695	13,385	170,076	42,900	46,583	42,900	46,583	559,077		
GERMANY		3,844	5,335	3,844	5,335	62,871	17,328	18,434	17,328	18,434	211,429		
JAPAN		1,368	2,271	1,368	2,271	40,454	5,586	5,275	5,586	5,275	93,264		
NETHERLANDS		781	2,242	781	2,242	20,915	3,733	7,064	3,733	7,064	53,497		
FRANCE		570	1,213	570	1,213	18,587	2,745	3,759	2,745	3,759	57,972		
CANADA		665	873	665	873	16,726	2,595	1,950	2,595	1,950	41,184		
OTHER		1,914	2,448	1,914	2,448	54,490	6,371	6,572	6,371	6,572	135,794		
Subtotal:-----		13,642	18,977	13,642	18,977	281,745	57,452	62,380	57,452	62,380	829,318		
<b>WALNUTS SH(AUG)</b>													
EU_15	MT	193	176	7,860	5,116	7,860	563	718	17,020	11,865	17,020		
JAPAN		724	429	5,953	5,676	5,953	2,468	1,751	22,633	31,804	22,633		
ITALY		0	0	3,545	612	3,545	0	0	5,864	1,108	5,864		
CANAOA		121	91	2,275	2,110	2,275	439	364	7,261	7,678	7,261		
ISRAEL		23	48	1,372	1,459	1,372	93	276	4,707	6,776	4,707		
SPAIN		36	41	1,204	1,794	1,204	159	195	3,291	3,998	3,291		
OTHER		217	136	4,556	3,931	4,556	833	721	14,256	12,495	14,256		
Subtotal:-----		1,277	881	22,015	20,291	22,015	4,395	3,829	65,876	70,618	65,876		
<b>WALNUTS UNSH(AUG)</b>													
EU_15	MT	19	0	43,938	48,199	43,938	35	0	69,868	92,596	69,868		
GERMANY		0	0	13,094	14,603	13,094	0	0	19,452	27,908	19,452		
SPAIN		0	0	10,238	13,877	10,238	0	0	16,330	25,912	16,330		
NETHERLANOS		19	0	9,116	9,842	9,116	0	0	15,026	19,021	15,026		
OTHER		83	113	9,611	9,266	9,611	134	247	17,226	17,962	17,226		
Subtotal:-----		102	113	53,549	57,464	53,549	169	247	87,094	110,558	87,094		
<b>HOPS&amp;PRODUCTS</b>													
HOP PELTS(SEP)	MT	10	0	2,724	2,108	2,829	50	0	14,334	11,034	14,879		
BRAZIL		139	99	1,265	1,270	1,382	910	661	8,365	8,399	9,139		
CANADA		48	8	1,043	601	1,099	332	39	6,724	3,098	7,044		
EU_15		0	0	451	326	451	0	0	2,873	1,264	2,873		
JAPAN		0	0	435	20	435	0	0	2,578	217	2,578		
COLOMBIA		19	2	409	166	418	145	19	2,671	784	2,705		
GERMANY		53	46	672	963	706	255	421	3,290	4,616	3,433		
OTHER													
Subtotal:-----		250	153	6,590	5,287	6,903	1,547	1,120	38,164	28,628	39,947		
<b>HOP EXTRACT(SEP)</b>													
EU_15	MT	70	35	1,377	1,397	1,499	851	499	21,469	20,949	23,750		
MEXICO		0	19	724	485	735	0	219	15,825	13,118	15,944		
GERMANY		28	0	618	457	624	342	8	9,407	6,431	9,542		
BRAZIL		77	26	438	287	458	619	275	5,184	3,341	5,350		
COLOMBIA		8	0	427	334	427	183	0	7,160	2,872	7,160		
KOREA, REPUBLIC		0	10	309	102	311	0	669	3,412	2,205	3,470		
OTHER		38	99	913	790	1,024	791	1,433	13,690	12,351	14,957		
Subtotal:-----		192	188	4,187	3,393	4,454	2,443	3,095	66,741	54,835	70,630		
<b>HOPS, NSPF(SEP)</b>													
EU_15	MT	21	23	1,527	2,275	1,544	70	68	9,532	11,453	9,651		
GERMANY		0	23	1,108	1,604	1,108	0	68	6,842	7,204	6,842		
UNITED KINGDOM		21	0	401	601	418	70	0	2,392	3,850	2,512		
MEXICO		89	51	162	329	189	688	482	1,319	2,006	1,494		
BRAZIL		10	0	169	12	169	39	0	957	126	957		
JAPAN		2	0	146	152	146	18	0	941	889	941		
OTHER		43	22	407	312	445	194	270	2,480	3,033	2,795		
Subtotal:-----		164	95	2,411	3,079	2,492	1,009	819	15,229	17,508	15,838		
<b>WINE</b>													
GRAPE WINE(JAN)	KL	5,829	5,585	30,852	39,457	55,735	8,729	10,756	49,880	76,610	93,678		
EU_15		3,638	3,281	18,313	20,186	32,530	5,594	6,528					

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN  
MARKETING YEAR BEGINNING AS INDICATED  
JUL 96

COMMODITY AND COUNTRY	COUNTRY REGION	QUANTITY						VALUE (1,000 DOLLARS)						
		CURR LAST	MO YR	CURR LAST	MO YR	YR TOT	YR TDT	CURR LAST	CURR LAST	MO YR	YR TOT	YR TDT	LAST YEAR	
FR FRT & MLNS														
FR APPLES(JUL)	MT	7,304	9,859	7,304	9,859	49,027	9,534	9,186	9,534	9,186	52,798			
NEW ZEALAND		1,252	1,610	1,252	1,610	71,873	441	751	441	751	27,528			
CANADA		3,247	5,518	3,247	5,518	47,829	1,833	2,078	1,833	2,078	22,624			
OTHER		Subtotal:-----	11,804	16,987	11,804	16,987	168,729	11,807	12,015	11,807	12,015	102,950		
FR PEARS(JUL)	MT	18	90	18	90	33,339	6	28	6	28	15,642			
CHILE		0	0	0	0	15,637	0	0	0	0	10,261			
ARGENTINA		0	0	0	0	8,366	0	0	0	0	8,109			
OTHER		Subtotal:-----	18	90	18	90	57,341	6	28	6	28	34,013		
APRICOT (MAY)	MT	0	0	0	0	1,344	0	0	0	0	0	1,604		
CHILE		0	0	0	0	310	0	0	0	0	0	852		
NEW ZEALAND		6	0	6	0	16	0	0	0	0	0	22		
OTHER		Subtotal:-----	6	0	6	0	1,670	9	0	9	0	2,477		
PEACH-NEC(MAY)	MT	0	0	0	0	40,677	0	0	0	0	0	30,485		
CHILE		0	0	0	0	392	14	0	0	0	0	416		
OTHER		Subtotal:-----	18	0	18	2	41,069	14	0	14	0	30,901		
PLUM-PRUNE(MAY)	MT	0	0	2	280	19,665	0	0	6	312	16,487			
CHILE		0	0	2	43	214	12	30	6	69	310			
OTHER		Subtotal:-----	11	23	40	324	19,879	12	30	68	381	16,797		
FRESH GRAPES (MAY)	MT	0	0	1,600	4,208	273,685	0	0	1,201	4,072	250,990			
CHILE		0	0	1,600	4,208	80,569	11,719	5,724	82,693	86,684	82,797			
MEXICO		11,581	3,383	80,487	59,864	59,539	5	0	300	254	4,436			
OTHER		Subtotal:-----	11,585	3,383	82,089	64,326	359,503	11,724	5,724	83,899	91,010	337,929		
FR RASPBRY(JAN)	MT	4,865	3,345	6,319	3,345	6,362	8,772	6,591	11,488	6,591	11,568			
CANADA		21	15	1,105	1,293	1,664	110	42	3,466	3,881	5,695			
OTHER		Subtotal:-----	4,885	3,359	7,424	4,637	8,026	8,883	6,633	14,954	10,472	17,263		
FR STRAWBERRIS(JAN)	MT	306	0	24,817	27,855	25,894	277	0	42,112	50,620	43,626			
MEXICO		41	315	137	430	2,890	89	367	286	570	45,077			
OTHER		Subtotal:-----	347	315	24,954	28,285	26,684	367	367	42,398	51,189	45,702		
FR BANANA(JAN)	MT	112,616	72,824	538,047	539,070	958,125	36,360	23,395	172,304	174,341	306,323			
COSTA RICA		69,713	62,144	597,453	520,241	931,548	18,951	16,818	165,160	145,410	256,231			
ECUADOR		124,384	19,125	1,036,694	1,179,958	1,774,148	35,107	56,609	293,848	333,433	499,891			
OTHER		Subtotal:-----	306,714	326,093	2,172,194	2,239,270	3,663,821	90,418	98,821	631,312	653,184	1,062,445		
FR MANGO(JAN)	MT	27,179	30,030	97,894	127,743	114,746	23,457	12,906	87,151	75,322	100,600			
MEXICO		824	365	21,463	22,061	27,647	750	426	14,601	14,211	23,031			
OTHER		Subtotal:-----	28,004	30,394	119,356	149,804	142,393	24,207	13,333	101,752	89,533	123,631		
FR PINAPPLE(JAN)	MT	7,383	7,168	47,556	45,710	76,991	2,558	2,974	16,896	16,979	27,389			
COSTA RICA		2,608	2,420	21,771	20,999	33,148	610	669	6,470	5,842	8,972			
HONOURAS		1,059	1,307	8,720	11,792	12,525	294	808	2,045	3,417	3,234			
OTHER		Subtotal:-----	11,050	11,895	78,046	78,501	122,664	3,462	4,451	25,411	26,238	39,596		
FR CANTLPE(MAY)	MT	657	1,142	27,234	37,493	130,065	112	265	8,712	11,101	39,141			
MEXICO		0	0	27,291	31,210	61,327	0	0	2,133	1,217	28,640			
COSTA RICA		0	0	4,722	4,739	5,075	0	0	1,518	1,818	15,890			
GUATEMALA		0	0	3,153	5,027	5,095	2	1	761	1,095	20,169			
OTHER		Subtotal:-----	661	1,143	40,379	50,469	323,563	114	267	13,124	15,231	103,840		
FR MELON,OT(MAY)	MT	2,007	0	12,246	9,719	55,740	568	0	4,627	3,181	19,311			
MEXICO		27	0	970	590	17,027	0	0	210	210	7,408			
COSTA RICA		0	0	3,667	3,928	48,588	0	0	912	1,620	17,302			
OTHER		Subtotal:-----	2,034	0	18,882	14,237	121,354	577	0	5,931	5,011	44,022		
FR ORANGES(NOV)	MT	639	4,934	639	4,934	5,523	622	7,001	622	7,001	6,391			
AUSTRALIA		0	0	7,589	7,401	7,589	0	0	2,922	3,196	2,922			
MEXICO		545	403	2,739	2,534	4,926	139	149	995	811	1,652			
OTHER		Subtotal:-----	1,184	5,337	10,967	14,869	18,038	761	7,149	4,541	11,007	10,967		
CANNEO FRUIT														
CNO MANDRN(JAN)	MT	310	165	22,478	1,641	23,299	329	157	21,905	1,461	22,831			
EU 15		310	165	22,472	1,637	23,290	329	157	21,894	1,457	22,803			
SPAIN		480	324	10,480	3,931	10,811	396	283	9,502	4,061	9,817			
CHINA, PEOPLES R		0	0	460	251	460	0	0	555	275	558			
OTHER		Subtotal:-----	790	489	33,418	5,822	34,570	725	440	31,962	5,798	33,207		
CNO 8LK OLV(NOV)	MT	957	1,134	8,411	10,766	10,964	2,127	2,798	18,856	25,292	24,733			
EU 15		953	1,923	6,918	9,297	1,880	2,243	1,382	21,580	20,510				
SPAIN		723	892	4,256	4,853	5,215	1,476	8,402	11,061	10,441				
MOROCCO		0	0	35	115	115	0	76	257	257	245			
OTHER		Subtotal:-----	1,685	2,026	12,711	15,733	16,303	3,610	4,925	27,355	36,610	35,440		
CNO GRN OLV(NOV)	MT	2,840	2,732	24,862	22,496	33,202	8,646	8,302	74,509	66,035	100,701			
EU 15		2,824	2,712	24,514	22,332	33,838	8,592	8,225	73,761	65,592	99,890			
SPAIN		258	345	1,334	2,377	2,245	2,495	8,558	73,715	53,413	3,528			
OTHER		Subtotal:-----	3,098	3,077	26,596	23,773	35,447	9,075	8,860	77,224	68,448	104,229		
CNO PEACH(JUN)	MT	780	1,173	1,985	2,814	10,568	497	818	1,186	1,969	7,087			
EU 15		776	1,150	1,958	2,784	10,489	484	784	1,139	1,912	6,898			
GREECE		376	711	1,515	975	3,532	243	485	347	695	2,539			
OTHER		Subtotal:-----	1,156	1,885	2,499	3,790	14,100	740	1,303	1,532	2,664	9,626		
CNO PINAPPLE(JAN)	MT	7,026	10,860	68,058	70,829	124,605	3,973	6,886	37,204	45,315	72,287			
PHILIPPINES		5,791	12,510	79,737	56,988	99,474	3,141	8,723	41,515	40,264	53,336			
THAILAND		2,819	8,188	27,813	51,439	71,416	1,621	6,232	12,484	31,096	31,492			
OTHER		Subtotal:-----	15,636	31,558	175,608	179,256	295,495	8,735	21,841	91,202	116,674	157,115		
ORIEO FRUIT														
ORO APRCT(JUL)	MT	576	285	576	285	14,0								

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN  
MARKETING YEAR BEGINNING AS INDICATED  
JUL 96

COMMODITY AND COUNTRY		QUANTITY						VALUE (1,000 DOLLARS)						LAST YEAR
COUNTRY REGION		CURR LAST	MO YR	CURR LAST	MO YR	YR TOT	YR TOT	CURR LAST	MO YR	CURR LAST	MO YR	YR TOT	YR TOT	CURR LAST
DRYED FRUIT DATES(SEP)	MT	86	151	1,756	3,104	1,757	94	170	1,706	3,089	1,049	1,708	3,834	1,708
PAKISTAN		24	54	586	597	592	33	859	859	1,695	1,695	868	834	868
CHINA, PEOPLES R		20	39	395	860	414	60	101	767	767	1,239	1,239	1,927	1,927
OTHER	Subtotal:-----	130	244	2,738	4,561	2,764	187	319	3,332	5,833	5,833	5,833	3,410	3,410
DRD FIG(SEP)	MT	0	0	1,134	823	1,134	0	0	0	2,736	1,919	2,736	2,736	2,736
EU 15		0	0	1,069	803	1,069	0	0	2,572	1,849	2,572	2,572	2,572	
GREECE		0	0	1,401	678	1,420	177	0	1,911	1,239	1,911	1,911	1,927	
TURKEY		157	0	267	307	365	0	0	884	916	884	916	1,209	
MEXICO		0	6	26	32	28	0	0	64	69	64	69	71	
OTHER	Subtotal:-----	157	9	2,829	1,840	2,948	177	6	5,595	4,143	5,595	4,143	5,943	
DRD RAISIN(AUG)	MT	383	70	5,543	8,370	5,543	378	57	4,929	7,796	4,929	7,796	4,929	
MEXICO		281	133	2,316	1,724	2,316	183	2,867	2,006	2,867	2,006	2,807		
CHILE		141	60	1,863	1,727	1,863	145	66	1,871	1,756	1,871	1,756	1,871	
TURKEY		19	426	286	426	22	3	447	289	447	289	447	447	
OTHER	Subtotal:-----	824	265	10,148	12,107	10,148	923	309	10,055	11,847	10,055	11,847	10,055	
FRUIT JUICE(SSE)														
APPLE JUIC(JUL)	KL	42,732	34,775	42,732	34,775	314,057	14,646	12,125	14,646	12,125	110,229	110,229	110,229	
ARGENTINA		12,810	13,468	12,810	13,468	219,220	4,990	5,706	4,990	5,706	92,527	92,527		
EU 15		5,844	12,392	5,844	12,392	159,519	2,137	5,151	2,137	5,151	65,955	65,955		
GERMANY		20,118	46,867	20,118	46,867	305,039	6,529	18,098	6,529	18,098	114,986	114,986		
OTHER	Subtotal:-----	75,660	95,110	75,660	95,110	838,316	26,165	35,929	26,165	35,929	317,741	317,741		
FCOJ(DEC)	KL	12,434	53,749	255,987	400,586	390,548	2,840	14,240	50,504	101,943	82,477	82,477		
BRAZIL		17,116	4,032	210,517	126,433	248,924	4,374	1,334	49,692	37,321	59,483			
MEXICO		6,114	7,434	67,750	87,014	86,074	1,610	2,503	15,884	26,272	20,438			
OTHER	Subtotal:-----	35,664	65,215	534,255	614,033	729,546	8,824	18,077	116,079	165,536	162,397			
GRAPE JU(JAN)	KL	3,714	27,903	12,776	103,687	51,315	956	8,020	3,450	26,897	12,785	12,785		
ARGENTINA		860	1,975	5,214	20,078	14,711	223	778	1,510	5,806	4,076			
CHILE		1,704	611	15,865	8,076	22,740	766	384	6,087	4,785	9,260			
OTHER	Subtotal:-----	6,279	30,488	33,855	131,841	88,766	1,946	9,182	11,047	37,488	26,121			
PNEAPL JUCN(JAN)	KL	7,075	14,281	77,534	73,381	97,211	1,335	5,120	13,680	24,027	18,019			
THAILAND		3,748	6,664	59,389	54,182	114,084	573	8,130	8,501	16,167				
PHILIPPINES		1,649	6,919	11,188	24,755	26,319	426	2,643	7,738	7,738				
OTHER	Subtotal:-----	12,471	27,863	148,108	152,318	237,613	2,335	8,272	24,454	40,266	40,703			
PNEAPL JUNC(JAN)	KL	5,019	3,587	30,037	19,934	51,400	1,549	1,099	9,304	6,221	16,003			
PHILIPPINES		324	1,178	8,501	9,420	18,013	774	8,865	4,488	10,398				
THAILAND		131	88	5,419	5,985	14,794	51	1,061	1,561	2,635				
OTHER	Subtotal:-----	6,074	4,852	43,956	37,339	84,208	2,374	2,015	17,229	12,270	29,036			
FROZEN FRUIT FZN STR8RY(DEC)	MT	445	679	24,831	19,749	26,227	361	563	23,497	16,065	24,480			
MEXICO		97	0	674	231	701	155	36	1,890	505	2,239			
OTHER	Subtotal:-----	541	679	25,505	19,980	26,928	516	598	25,387	16,570	26,719			
FRESH VEGETABLES														
FR BEANS(OCT)	MT	63	124	12,425	18,553	12,543	92	83	20,082	19,952	20,264			
MEXICO		219	176	555	364	1,656	167	197	471	381	1,360			
OTHER	Subtotal:-----	283	300	12,979	18,916	14,198	259	281	20,553	20,333	21,624			
FR CARROT(OCT)	MT	1,193	317	56,061	53,870	73,712	505	125	16,567	14,526	22,668			
CANADA		3,312	4,906	22,950	28,460	27,215	437	837	3,533	4,693	4,195			
MEXICO		0	74	181	444	242	0	36	1,135	1,198	202			
OTHER	Subtotal:-----	4,506	5,296	79,193	82,774	101,168	941	998	20,235	19,417	27,065			
FR CABBAGE(OCT)	MT	1,739	3,806	18,241	23,135	25,106	384	1,650	4,869	6,330	6,713			
CANADA		1,594	3,369	7,190	11,818	8,547	110	684	1,472	2,116	1,690			
MEXICO		0	0	34	20	34	2	0	25	10	25			
OTHER	Subtotal:-----	2,333	7,175	25,465	34,974	33,687	496	2,334	6,366	8,456	8,428			
FR CELERY(OCT)	MT	0	0	20,052	23,076	20,056	0	0	8,950	4,797	8,951			
MEXICO		212	57	691	615	3,951	88	49	369	363	1,337			
OTHER	Subtotal:-----	212	57	20,743	23,691	24,006	88	49	9,319	5,160	10,289			
FR CUCM8R(OCT)	MT	6,745	7,700	210,862	272,789	216,388	1,702	2,838	117,948	104,658	119,326			
MEXICO		1,047	974	19,185	15,965	21,095	825	954	6,874	7,710	8,193			
OTHER	Subtotal:-----	7,792	8,675	230,048	288,754	237,483	2,528	3,792	124,822	112,367	127,519			
FR CAULFLWR(OCT)	MT	624	924	1,604	1,311	3,383	217	388	559	506	1,216			
CANADA		0	13	1,948	1,011	1,965	0	2	542	404	549			
MEXICO		0	0	13	0	27	0	0	8	0	23			
OTHER	Subtotal:-----	624	937	3,564	2,322	5,375	217	390	1,109	909	1,787			
FR GARLIC(OCT)	MT	1,458	1,809	15,638	15,973	16,004	2,181	2,288	19,791	18,203	20,144			
MEXICO		223	184	6,197	5,115	6,681	337	314	8,481	6,944	9,106			
OTHER	Subtotal:-----	1,681	1,993	21,834	21,087	22,685	2,518	2,603	28,273	25,147	29,250			
FR ONION(OCT)	MT	5,657	6,595	173,288	212,037	181,755	4,924	5,088	105,157	119,695	112,729			
MEXICO		679	2,220	30,144	37,508	33,020	752	970	13,672	15,635	15,472			
OTHER	Subtotal:-----	6,336	8,815	203,433	249,545	214,775	5,675	6,058	118,829	135,330	128,201			
FR PEPPERS(OCT)	MT	4,019	7,643	154,280	211,967	183,383	3,551	3,804	165,930	130,076	179,459			
EU 15		3,862	3,119	15,569	13,023	19,511	10,025	7,184	42,762	35,816	52,433			
NETHERLANDS		3,893	3,087	15,139	12,740	18,994	9,842	7,099	41,440	34,933	50,912			
OTHER	Subtotal:-----	3,514	657	3,564	5,260	8,024	1,624	1,899	8,138	12,348	12,721			
FR SEED POT(OCT)	MT	27	360	99,551	136,164	99,720	2	71	17,209	26,417	17,245			
CANADA		0	20	89	89	99,721	2	11	6	58	9			
OTHER	Subtotal:-----	28	380	99,551	136,254	99,721	3	82	17,216	26,475	17,253			
FR TBL POT(OCT)	MT	2,728	6,396	117,467	325,538	146,720	474	1,641	22,389	66,564	27,206			
CANADA		1	0	33	0	40	3	0	27	0	46			
OTHER	Subtotal:-----	2,729	6,396	117,500	325,538	146,760	478	1,641	22,416	66,564	27,252			

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN  
MARKETING YEAR BEGINNING AS INDICATED  
JUL '96

COMMODITY AND COUNTRY		QUANTITY						VALUE (1,000 DOLLARS)					
COUNTRY REGION	LAST MO	CURR MO	YR TOT LAST	YR TOT YR	LAST YEAR	CURR MO	CURR MO	YR TOT LAST	YR TOT YR	YR TOT CURR	LAST YEAR		
FRESH VEGETABLES FR TOMATO(OCT)	MT	25,554	33,288	478,786	612,588	534,344	14,102	18,941	335,715	565,254	366,385		
MEXICO		5,186	8,185	20,970	38,536	29,427	8,008	12,809	33,693	71,481	39,682		
OTHER		Subtotal:-----	30,740	41,473	499,756	651,123	559,771	22,110	31,750	369,407	636,735	406,067	
FR ASPARG(OCT)	MT	1,797	2,171	19,597	19,015	21,447	2,416	2,992	33,705	29,536	36,319		
MEXICO		236	186	9,756	4,028	3,226	430	319	10,393	13,387	14,544		
PERU		388	313	9,409	4,191	3,959	616	521	4,185	5,534	4,800		
OTHER		Subtotal:-----	2,422	2,670	29,762	27,233	34,632	3,461	3,832	48,283	48,458	55,664	
CANNED VEGETABLES CNO TOM PST(JUL)	MT	0	0	0	0	7,987	0	0	0	0	5,149		
MEXICO		54	106	54	106	5,549	42	97	42	97	2,929		
ISRAEL		0	0	0	0	2,349	804	0	804	0	1,810		
CHILE		1,115	126	1,115	126	1,351	117	122	117	122	1,373		
OTHER		1,159	126	1,159	126	1,236	963	219	963	219	11,261		
Subtotal:-----		1,329	232	1,329	232	15,236							
CNO TOM SAUCE(JUL)	MT	280	557	280	557	6,605	550	1,558	550	1,558	9,995		
EU 15		486	416	486	416	10,790	395	371	395	371	7,386		
CANADA		100	433	100	433	2,038	340	1,481	340	1,481	7,081		
SPAIN		840	18	840	18	2,222	270	18	570	18	5,399		
OTHER		Subtotal:-----	1,605	991	1,605	991	23,616	1,515	1,946	1,515	1,946	22,776	
CNO TOMATO(JUL)	MT	440	18	440	18	19,674	276	9	276	9	11,947		
ISRAEL		1,414	2,043	1,414	2,043	20,409	400	591	400	591	5,747		
EU 15		1,559	1,664	1,559	1,664	11,725	723	757	11,725	757	5,569		
CHILE		1,361	1,868	1,361	1,868	19,475	385	541	19,475	541	5,508		
ITALY		296	470	296	470	6,871	128	266	6,871	128	3,479		
OTHER		Subtotal:-----	3,709	4,195	3,709	4,195	58,679	1,527	1,624	1,527	1,624	26,743	
CNO MSHROOM(JUL)	MT	3,834	3,476	3,834	3,476	23,912	8,291	6,026	8,291	6,026	46,720		
CHINA, PEOPLES R		1,301	1,232	1,301	1,232	14,579	3,383	2,870	3,383	2,870	35,124		
INDONESIA		1,891	1,413	1,891	1,413	16,725	4,467	3,256	16,725	4,467	3,256		
OTHER		Subtotal:-----	7,027	6,120	7,027	6,120	57,215	16,141	12,151	16,141	12,151	125,134	
FROZEN VEGETABLES FZN BROCOLI(SEP)	MT	9,496	10,259	137,188	152,689	147,045	5,398	5,805	79,866	81,777	85,384		
MEXICO		824	1,751	14,278	19,314	19,111	640	1,157	10,039	14,243	13,903		
OTHER		Subtotal:-----	10,320	12,010	151,466	172,002	166,156	6,038	6,961	89,905	96,020	99,287	
FZN CAULFLR(SEP)	MT	266	377	22,551	15,953	23,066	192	256	14,498	9,732	14,886		
MEXICO		81	81	24,289	1,514	2,611	69	1,549	1,099	1,099	1,757		
OTHER		Subtotal:-----	371	458	24,840	17,468	25,677	261	312	16,047	10,831	16,642	
FZN POTATO(SEP)	MT	12,891	16,170	147,054	163,958	157,531	8,105	10,255	88,477	100,309	94,960		
CANADA		37	4	246	278	300	55	12	333	394	394		
OTHER		Subtotal:-----	12,928	16,174	147,300	164,237	157,832	8,160	10,267	88,810	100,703	95,354	
TREE NUTS PISTACHIO NSH(SEP)	MT	12	0	68	230	68	42	0	210	609	210		
TURKEY		0	0	68	32	68	0	0	112	49	112		
CHINA, PEOPLES R		0	0	2	8	2	0	0	8	12	8		
OTHER		Subtotal:-----	12	0	138	270	138	42	0	330	670	330	
CASHEW NUT(AUG)	MT	2,325	3,483	31,403	27,355	31,403	10,479	18,068	136,022	134,902	136,022		
INDIA		1,948	1,800	22,358	25,018	25,358	9,109	8,832	100,544	121,183	100,544		
BRAZIL		289	845	2,995	5,085	2,995	1,316	3,941	12,754	22,976	12,754		
OTHER		Subtotal:-----	4,563	6,128	56,757	57,458	56,757	20,903	30,841	249,321	279,061	249,321	
FILBERTS(AUG)	MT	653	276	5,910	4,395	5,910	2,323	873	21,149	14,816	21,149		
TURKEY		2	18	247	247	2,476	63	935	21,961	15,958	21,961		
OTHER		Subtotal:-----	654	294	6,157	5,053	6,157	2,326	935	21,961	15,958	21,961	
PECANS NSH(SEP)	MT	21	0	19,136	20,122	19,219	34	0	37,836	27,608	37,949		
MEXICO		0	41	0	41	41	0	0	68	0	68		
OTHER		Subtotal:-----	21	0	19,177	20,122	19,260	34	0	37,903	27,608	38,016	
WINES CHMP&SPRK WN(JAN)	KL	1,781	2,190	10,049	10,790	29,944	16,342	24,202	96,176	114,474	288,832		
EU 15		600	832	3,481	4,103	9,930	11,452	17,697	68,213	84,105	200,949		
FRANCE		437	602	3,418	2,912	11,200	1,892	3,168	15,195	14,352	50,900		
ITALY		3	23	82	94	277	10	71	269	306	1,051		
OTHER		Subtotal:-----	1,784	2,214	10,132	10,885	30,222	16,353	24,273	96,446	114,780	289,884	
FT&VERM WN(JAN)	KL	1,176	1,121	7,202	7,686	13,386	5,018	4,675	31,917	35,408	58,756		
EU 15		129	148	944	1,161	1,761	1,568	1,561	10,272	13,217	18,828		
PORTUGAL		629	708	3,863	4,430	1,204	1,939	1,872	9,694	11,539	17,526		
ITALY		335	179	1,958	1,406	3,466	1,611	864	9,497	6,898	16,754		
SPAIN		17	64	185	195	381	87	329	722	1,006	1,568		
OTHER		Subtotal:-----	1,193	1,185	7,387	7,882	13,766	5,105	5,003	32,639	36,414	60,324	
OTH GP WINE(JAN)	KL	13,425	18,829	95,903	115,951	177,249	48,008	72,797	349,789	432,806	662,411		
EU 15		4,766	7,667	31,472	41,832	60,100	25,461	36,186	173,733	205,297	340,241		
FRANCE		7,003	8,985	51,953	60,732	94,502	16,995	29,079	134,288	180,467	245,296		
ITALY		4,268	8,415	27,277	49,324	51,104	10,971	19,697	67,754	108,971	128,619		
OTHER		Subtotal:-----	17,693	27,243	123,180	161,275	228,353	58,379	92,494	417,543	541,777	791,226	
OTH WN PROO(JAN)	KL	175	140	973	911	1,599	734	547	4,625	4,152	7,428		
JAPAN		467	583	2,496	2,886	2,180	642	621	3,668	3,549	6,959		
EU 15		132	493	1,281	1,744	2,711	202	473	1,774	1,719	3,349		
UNITED KINGDOM		148	248	1,082	1,367	1,998	266	345	1,673	1,691	2,867		
OTHER		Subtotal:-----	790	971	4,552	5,164	8,777	1,642	1,513	9,966	9,392	17,244	
CUT FLOWERS ROSES(JAN)	NONE	0	0	0	0	0	5,588	7,216	65,275	85,227	99,585		
COLOMBIA		0	0	0	0	0	1,986	2,277	16,199	22,556	27,952		
ECUADOR		0	0	0	0	0	1,474	1,102	18,821	16,620	24,604		
OTHER		Subtotal:-----	0	0	0	0	9,048	10,595	100,295	124,402	152,141		
CARNATIONS(JAN)	NONE	0	0	0	0	0	6,412	7,385	67,708	82,296	109,471		
COLOMBIA		0	0	0	0	0	6,186	2,283	2,678	3,604	3,995		
OTHER		Subtotal:-----	0	0	0	0	6,598	7,668	70,386	85,900	113,466		

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Summaries and selected tables from several Foreign Agricultural Service (FAS) trade reports are available through the U.S. Department of Commerce's Economic Bulletin Board (EBB). The reports are Cotton: World Markets and Trade, Dairy: World Markets and Trade, Grain: World Markets and Trade, World Horticultural Trade & U. S. Export Opportunities, Oilseeds: World Markets and Trade, Sugar: World Market and Trade, Tobacco: World Markets and Trade, Wood Products: International Trade & Foreign Markets, World Agricultural Production and U. S. Export Sales.

These reports and others from U.S. agricultural Attachés overseas are available electronically on the EBB on release day and remain on-line until the next report in the series is issued. You can reach the EBB from most personal computers equipped with a modem and standard communications software. You can also access the EBB over the Internet using TELNET at ebb.stat-usa.gov. The EBB is available 24 hours a day, 7 days a week, and supports over 50 concurrent users. For more information, call 202-482-1986 (Monday-Friday, 8:30 a.m.-5:30 p.m. EST.) Subscriptions cost \$45 a year. Connect time fees range from 5 to 40 cents a minute.

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